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# **Report Name:** Citrus Annual

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**Report Highlights:**

Orange production in Australia for fresh consumption and juicing is forecast to rise by 1.7 percent to 590,000 metric tons (MT) in marketing year (MY) 2025/26—the highest level in more than two decades and the sixth consecutive year of growth. Production of fresh-market oranges is expected to decline due to lower fruit set linked to early seasonal conditions; however, increased volumes for juicing are anticipated to more than offset this decline. Tangerine/mandarin production is also forecast to increase for the sixth consecutive year, reaching 270,000 MT, supported by expanding areas and maturing trees. Orange exports are projected to reach a record 200,000 MT, while tangerine/mandarin exports are expected to set a new record of 133,000 MT in MY 2025/26. Australia's orange juice production is forecast to rise by 10 percent to 17,300 MT, while imports are expected to partially recover to 9,500 MT following recent supply shortages caused by drought-related constraints in Brazil.

## EXECUTIVE SUMMARY

Orange production in Australia is projected to reach 590,000 metric tons (MT) in marketing year (MY) 2025/26, up from an estimated 580,000 MT in MY 2024/25. If realized, this would mark the highest output in more than two decades and the sixth straight year of growth. Most of this increase is attributed to a 20,000 MT increase in the production of juicing varieties due to a positive biennial effect, while production of fresh-market varieties is forecast to decline by around 10,000 MT.

Early seasonal conditions have been mixed. Above-average temperatures in October 2025 produced strong flowering; however, below-average temperatures during November in the Murray Valley and Riverland—key regions for fresh-market production—resulted in below-average fruit set and smaller than usual fruit size at this early production phase. Expanding bearing area and maturing trees is expected to partially offset the impact of these early-season conditions.

Input costs for fertilizers and crop protection chemicals have stabilized, providing some relief for producers. However, major irrigation water storages have fallen significantly, leading to reduced water availability and elevated tradeable water prices through MY 2024/25, with the potential to continue into the forecast year. While they are expected to adequately secure their requirements, the higher prices still present a challenge.

Orange exports are forecast to reach a record 200,000 MT, from the MY 2024/25 estimate, supported by improved fruit quality despite a slight reduction in fresh-market production. Domestic consumption is projected to fall to 175,000 MT, down from an estimated 185,000 MT in MY 2024/25, mostly due to higher overall quality raising the share suitable for the export market. Oranges destined for processing are forecast to increase by 10 percent to 225,000 MT due to the positive biennial production effect.

Mandarin production continues to expand more rapidly than orange production, supported by a wider geographical distribution of plantings and strong consumer demand for seedless varieties. Over the past decade, the planted area has increased by 78 percent, and many newer plantings are now beginning to bear fruit. Mandarin output is forecast to reach a sixth consecutive record of 270,000 MT in MY 2025/26, with exports also projected to set a fifth consecutive record at 133,000 MT. Domestic consumption is forecast to rise to a record 133,000 MT, driven by expanding supply and population growth.

Australia’s orange juice production is expected to increase by 10 percent to 17,300 MT in MY 2025/26, reflecting favorable biennial production dynamics. Orange juice imports are forecast to partially recover to 9,500 MT—up from 9,000 MT in MY 2024/25—amid expectations of improved supply from Brazil following drought-induced shortages in recent years. Orange juice exports are projected to rise modestly to 4,300 MT, while domestic consumption is expected to rebound by seven percent to 22,500 MT, from a low in MY 2024/25 due to low imports associated with tight world export supply.

# FRESH ORANGES

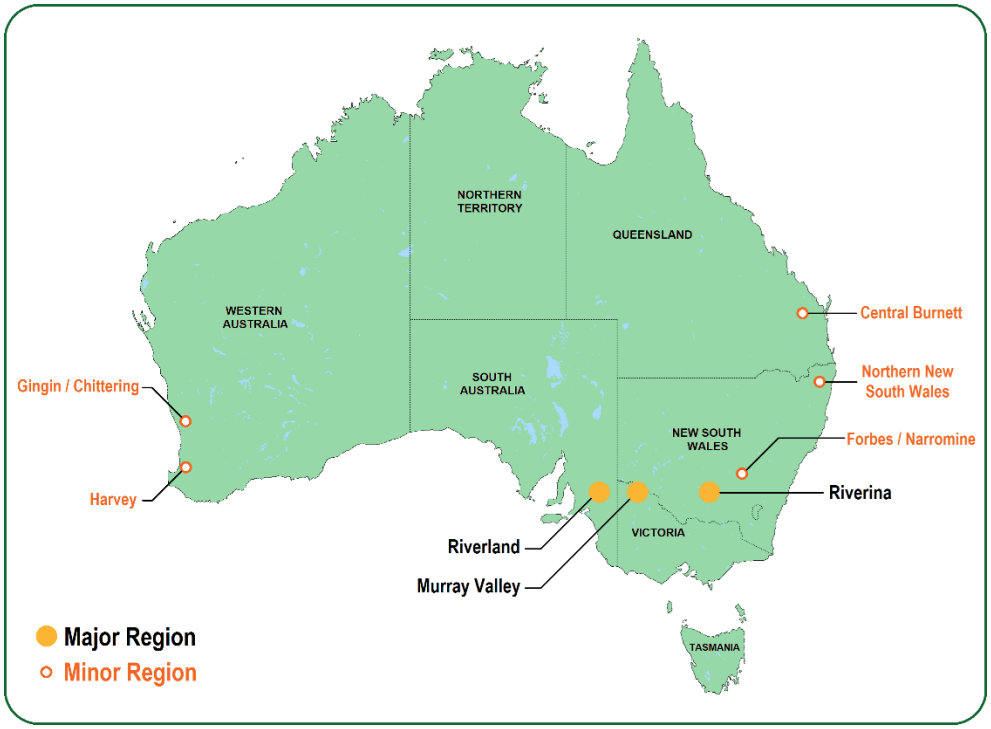
## Industry Background

### *Regional Overview*

Major developments in Australia's orange industry emerged in the late 19th and early 20th centuries following the establishment of large irrigation schemes in the Murray Valley, Riverland, and later the Riverina. Located in southern temperate climate zones with reliable access to irrigation water (see Figure 1), these regions remain the core production areas for both fresh and juicing oranges.

- **Riverina**: Southern New South Wales, centered around Griffith and Leeton.
- **Murray Valley**: Along the Murray River in northwest Victoria, primarily between Mildura and Swan Hill.
- **Riverland**: Along the Murray River in northwest South Australia.

**Figure 1 – Orange Production Regions in Australia**




*Source: Citrus Australia / Australian Bureau of Statistics Census / FAS/Canberra*

Through the mid-20th century, orange production expanded steadily as improved irrigation, mechanization, and post-harvest handling technology enhanced both yields and fruit quality. Historically, the industry was dominated by Valencia oranges destined for the domestic juice market. However, from the 1980s onward, increasing export opportunities and declining domestic juice consumption drove a gradual shift toward navel varieties for fresh market exports.

These major growing regions are characterized by temperate climates, free-draining sandy loam soils, and low annual rainfall of around 300 millimeters (mm)—most of which occurs between May and October during harvest and early growth stages of the next crop. While winters are mild, the regions still provide sufficient chilling for citrus trees. Due to low rainfall, orchards rely heavily on irrigation to meet water requirements. This combination of good chill accumulation, low disease pressure, and warm, dry conditions from spring through autumn minimize the risk of frosts, humidity and hail and combined with efficient irrigation management, supports strong bud burst and high yield and quality potential.

Together, these regions account for 18,318 hectares (ha) of orange production, representing 91 percent of the national total. According to the Citrus Australia – Australian Citrus Tree Census 2024, navel oranges comprise 13,600 ha and Valencia oranges 6,434 ha. The Riverina is the largest production area, with 41 percent of its plantings in Valencia oranges—equivalent to 65 percent of Australia's total juicing orange area. Smaller production areas are also located in northern New South Wales, Queensland, and Western Australia.

## *Harvest Periods*

The harvest period in the three major production regions for navel oranges is mostly from June to October, and for Valencia oranges, it is mostly from November to March (see Table 1), but the season begins earlier and end later with lighter volumes. Some of the highest quality Valencia oranges are sold in the fresh market (rather than being juiced), helping extend domestic availability of fresh oranges.

**Table 1 – Orange Harvest Seasonality in Australia**

| Orange Harvest Seasonality in Australian | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **State** | **Apr** | **May** | **Jun** | **Jul** | **Aug** | **Sep** | **Oct** | **Nov** | **Dec** | **Jan** | **Feb** | **Mar** |
| Fresh (Navel) | | | | | | | | | | | | |
| Juicing (Valencia) | | | | | | | | | | | | |

*Availability:* *High* *Medium* *Low*

*Source:* *Horticulture Innovation Australia*

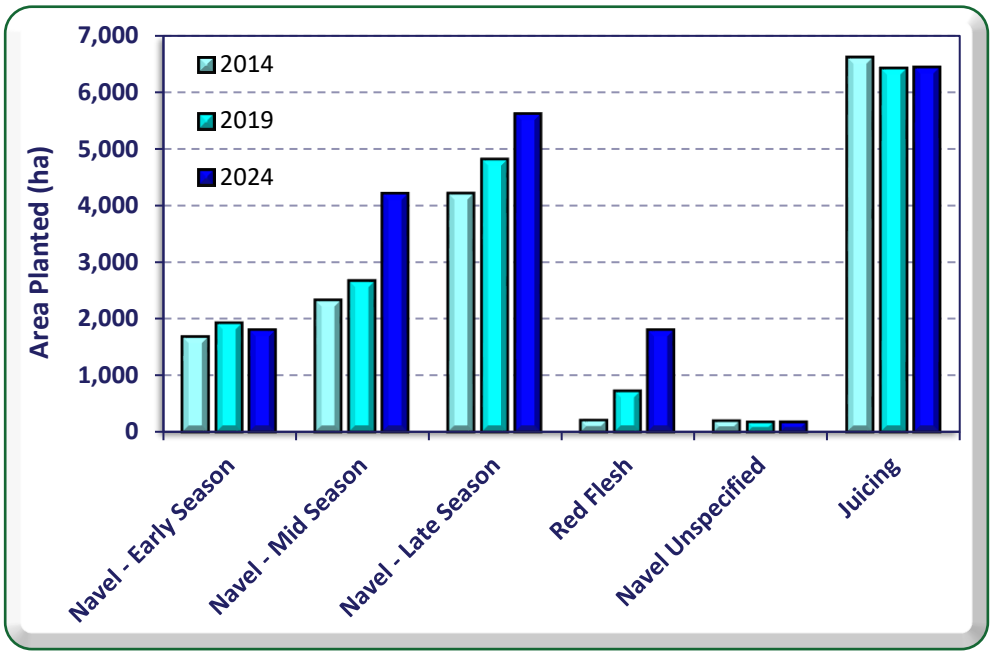
## *Trends in Planting Area*

Citrus Australia's annual tree census, initiated in 2014, has identified substantial changes in orange planting trends across the major producing regions. Between 2014 and 2024, plantings of navel and red-flesh varieties expanded significantly, with many of the newer orchards now entering their productive years.

For this report, all non-juicing varieties are grouped under navel oranges (representing about 85 percent of non-juicing types), while all juicing varieties are classified as Valencia oranges (which make up about 85 percent of juicing types).

The combined planted area of navel and Valencia oranges increased by 31 percent over the decade—from 15,307 ha in 2014 to 20,034 ha in 2024. During this period, Valencia plantings declined by 3 percent, while navel plantings grew by 56 percent. Growth was strongest among mid-season navels (up 79 percent, or 1,854 ha) and red-flesh navels (up 747 percent, or 1,590 ha) (see Figure 2).

**Figure 2 – Change in Orange Plantings 2014 to 2024**




*Source:* *Citrus Australia / Horticulture Innovation Australia*

## *Future Outlook for Production*

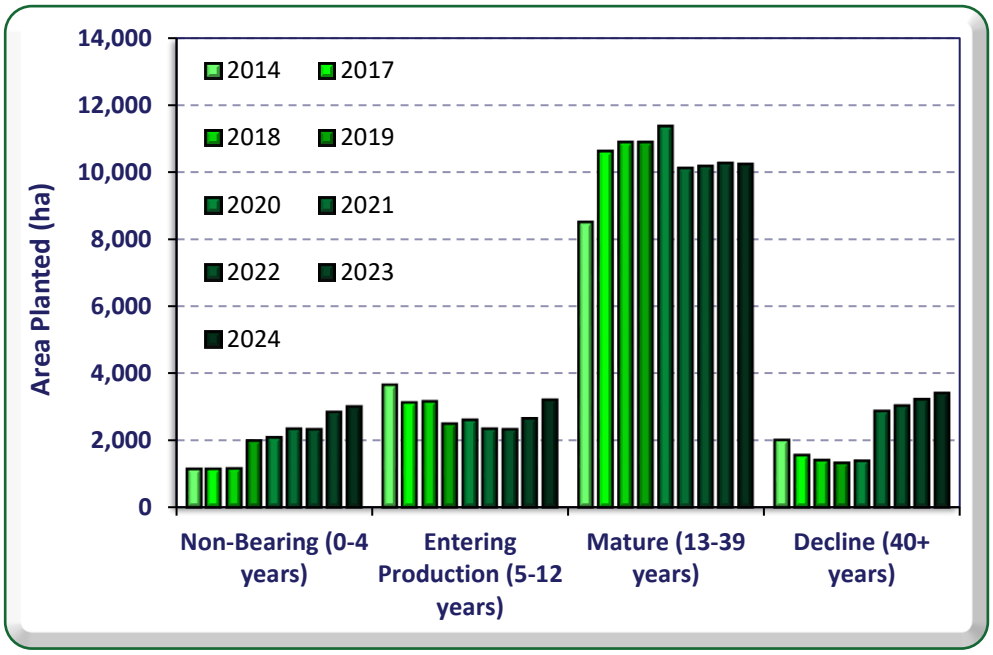
Long-term orange production is expected to continue growing moderately, primarily due to sustained tree expansion. Several structural factors underpin this outlook (see Figure 3):

1. **Increased Planting Rates**: Prior to 2019, new plantings (non-bearing 0–4-year-old trees) averaged around 1,200 ha per year. Since then, annual plantings have continued to rise and exceeded 3,000 ha in 2024, ensuring a steady flow of new trees entering production.

2. **Bearing Area Growth**: The total bearing area increased by 1,270 ha (10 percent) between 2014 and 2024. Although the area of mature trees has remained relatively stable, there has been notable growth in 5–12-year-old trees now approaching peak production.

3. **Aging Trees**: An increasing share of plantings consists of older trees in the "Decline (40+ years)" category, particularly among Valencia varieties. This may temper overall production gains over time as older blocks become less productive or are removed.

**Figure 3 – Change in Orange Maturity Profile 2014 to 2024**




*Source:* *Citrus Australia / Horticulture Innovation Australia*

## Production

### MY 2025/26 Orange Production

FAS/Canberra forecasts Australia's orange production at 590,000 MT in MY 2025/26 (April 2026–March 2027). This would be the highest output in more than two decades and a 1.7-percent increase from the MY 2024/25 estimate of 580,000 MT. Production growth continues to be supported by expanding bearing area; however, the extent of growth is constrained by seasonal conditions that resulted in a less-than-optimal fruit set for the MY 2025/26 navel crop.

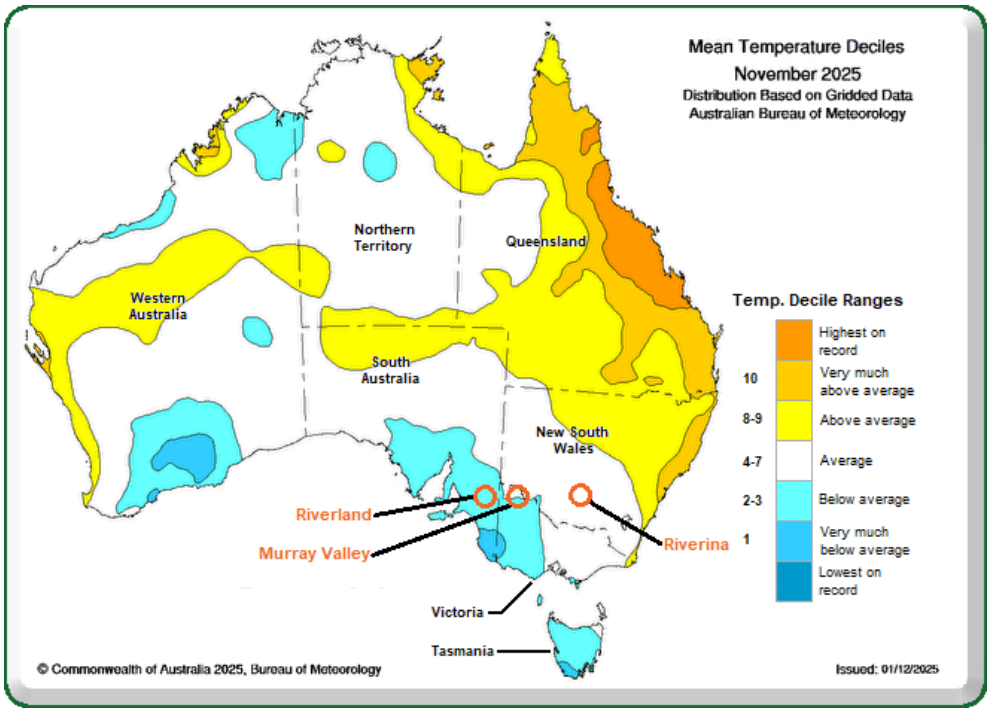
Over the past five years, a sustained increase in orange plantings has translated into an annual rise of roughly four percent in bearing area (trees five years and older). This growth has been concentrated in navel varieties for the fresh market, while Valencia plantings for juicing have remained largely unchanged over the last decade (see Figure 2). With navels comprising around two-thirds of total plantings, bearing area for fresh varieties has grown at roughly six percent per year. This upward trajectory is expected to continue into MY 2025/26; however, fruit-set issues have tempered production expectations for navels.

Of the total forecast production, 365,000 MT is expected to come from navel varieties and 225,000 MT from Valencia varieties. This represents a year-over-year decline of 10,000 MT for navels and an increase of 20,000 MT for Valencia oranges. Differences in harvest timing mean seasonal conditions may impact each variety differently.

Overall, Valencia production in MY 2025/26 is expected to improve, rebounding to typical historical levels following a below-average MY 2024/25 harvest currently underway. In contrast, navel production is forecast to decline despite increasing bearing area due to adverse seasonal conditions in late 2025.

A warmer-than-normal October supported exceptional flowering; however, this was followed by unusually mild November temperatures in the Murray Valley and Riverland—Australia's main navel production regions (see Figure 4). Growers report that these cooler conditions resulted in below-average fruit set and smaller early-season fruit size. They also note that actual temperature conditions felt milder than the official Australian Bureau of Meteorology decile data suggests.

**Figure 4 – Mean Temperature Deciles – November 2025**




*Source: Australian Bureau of Meteorology*

Despite the reduced fruit set, growers anticipate fewer blemishes and potentially higher export-grade quality. Although fruit size currently lags expectations, lighter crop loads may allow faster than usual fruit growth as conditions improve approaching harvest.

Forecasting Valencia production for MY 2025/26 is more challenging, as the MY 2024/25 harvest will not conclude until March 2026, leaving no early indication of the following year's crop load. Valencia oranges exhibit biennial tendencies, and MY 2024/25 is expected to be a down year. With little change in planted area, production is expected to rebound to around 225,000 MT, aligning with typical biennial "up-year" levels.

Production Costs and Input Trends

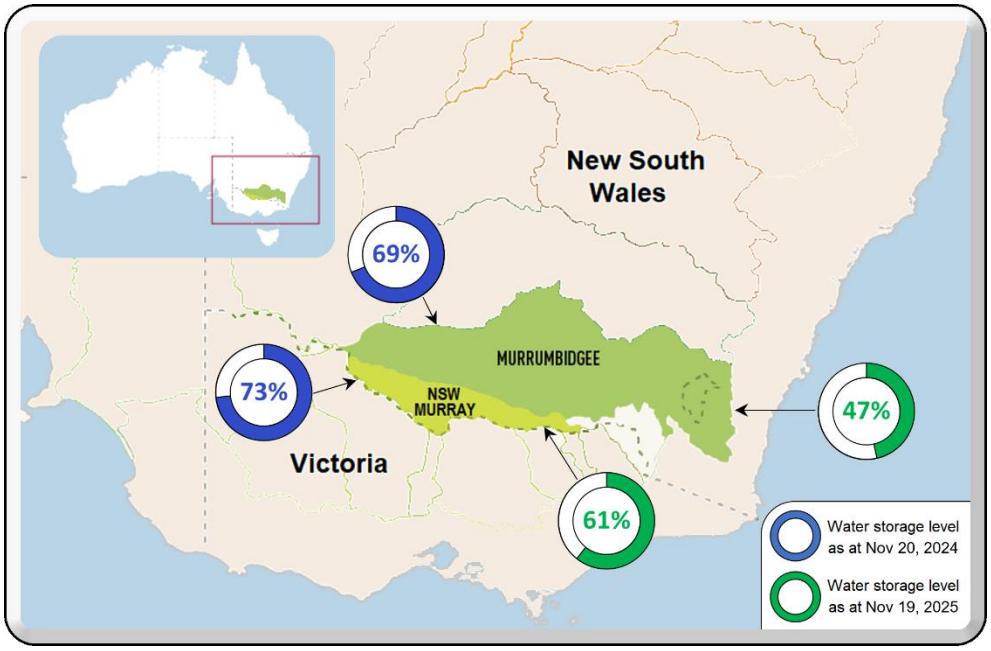
Irrigation water costs have risen sharply in MY 2024/25 and remain a concern for MY 2025/26. Storage levels at the beginning of the irrigation season (August/September 2025) were significantly below normal. Labor and energy costs are also increasing, placing upward pressure on grower cost structures. In contrast, fertilizer prices have stabilized slightly above pre-COVID-19 levels, and crop protection chemical prices have fallen below pre-pandemic levels.

Tradeable Irrigation Water Price Surge

Irrigation water storage levels at the end of spring (September–November)—normally a period of peak inflows—were substantially lower than in typical years across the systems supplying the Murray Valley, Riverland, and Riverina (see Figure 5).

The 2024/25 water year affects both navel production for MY 2025/26 and the ongoing MY 2024/25 Valencia harvest. Storage levels typically take several years to recover, so low supplies may continue into the 2025/26 irrigation season.

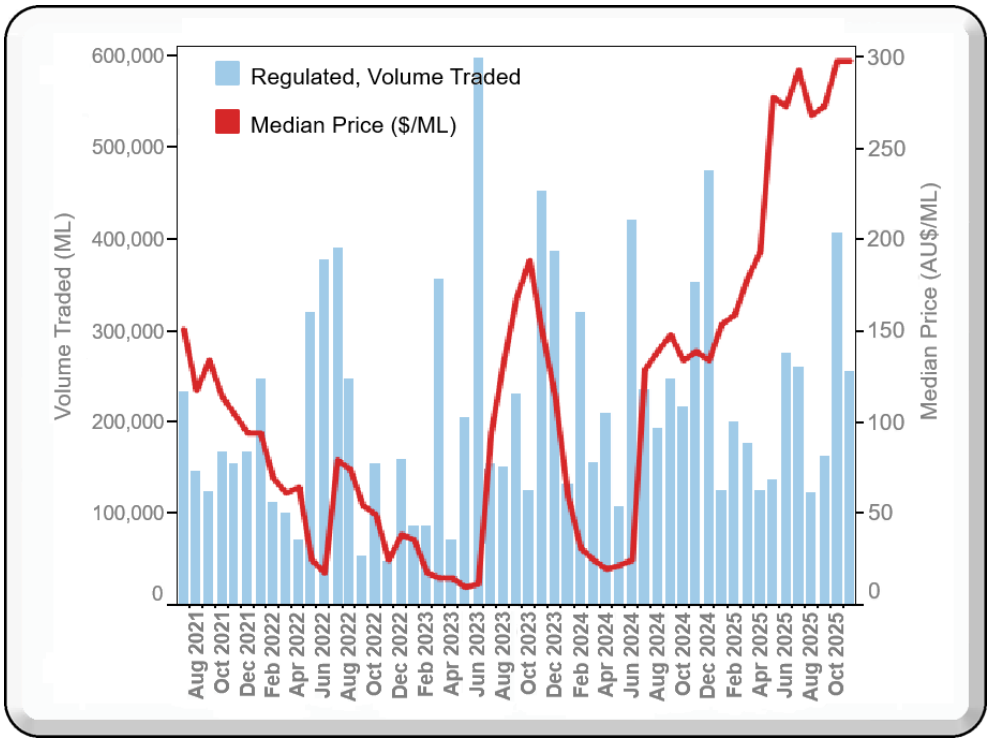
**Figure 5 – Irrigation Storage Levels – Nov 20, 2024 and Nov 19, 2025**




*Source: Murray Darling Basin Authority*

Lower storage volumes have driven a sharp rise in tradable water prices, reaching around AU$300 (US$200) per megaliter (see Figure 6). Because irrigating horticultural tree crops is more economically viable than irrigating rice, cotton, or dairy pastures, citrus growers are generally able to secure the water required to maintain yields. The main impact of higher prices is therefore increased production costs, with limited expected effect on actual orange output.

**Figure 6 – Water Trade Volume and Price in the Vic Murray Irrigation System**

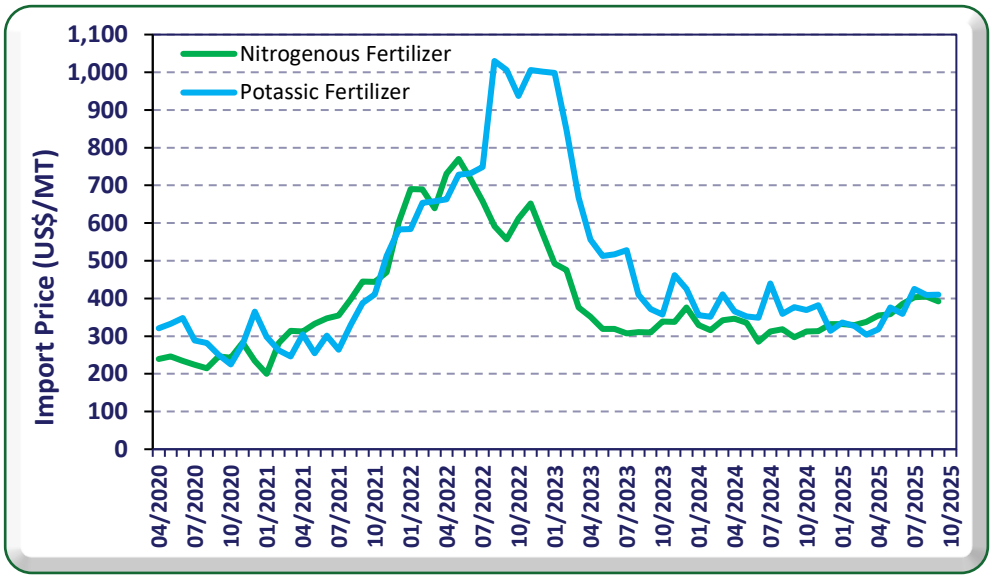



*Source:* *Australian Bureau of Meteorology*
*Note:* *ML = one million liters*

Fertilizer Prices Stabilize

Australia relies heavily on imported fertilizer, and import trends are a key indicator of on-farm cost movements. Since late 2023, nitrogenous and potassic fertilizer prices have stabilized slightly above pre-COVID-19 levels (see Figure 7). These are far more manageable for growers than the price spikes recorded in 2022–23, which were driven by high global energy costs and supply chain disruptions. No major supply disruptions are anticipated, allowing growers to implement fertilizer programs to support optimal yields.

**Figure 7 – Fertilizer Import Price Trend**

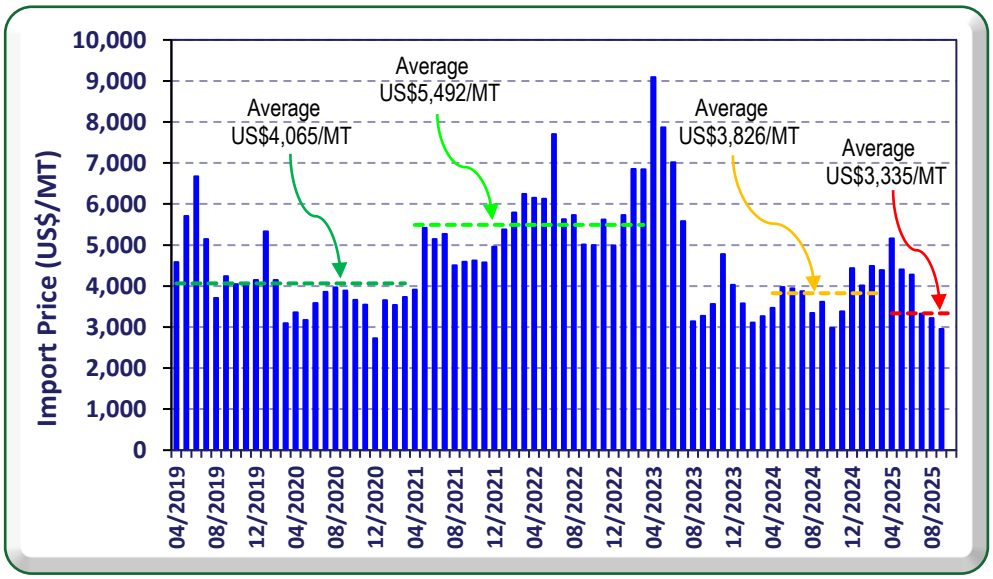



*Source:* *Australian Bureau of Statistics*

Crop Protection Chemicals Below pre-COVID-19 Prices

Citrus growers also rely heavily on imported crop protection chemicals. Price trends mirror those of fertilizers—stable since late 2023—but now sitting below pre-COVID-19 levels (see Figure 8). This stability supports continued investment in crop protection programs and contributes to maintaining navel fruit quality in MY 2025/26.

**Figure 8 – Chemical Import Price Trend**




*Source:* *Australian Bureau of Statistics*

*Note:* *HS Code 3808 (Insecticides, Rodenticides, Fungicides, Herbicides, Anti-sprouting Products etc., Packaged for Retail Sale or as Preparations or Articles)*

### MY 2024/25 Orange Production

FAS/Canberra estimates MY 2024/25 production at 580,000 MT, an upward revision of 35,000 MT from the previous forecast and slightly above the upward revised MY 2023/24 estimate of 575,000 MT. While overall growth is modest, navel production is estimated to increase by 30,000 MT due to expanding bearing area. In contrast, Valencia production is expected to decline by 25,000 MT owing to both the biennial down-year effect and seasonal challenges.

Growers reported excellent flowering and fruit set early in the season, with expectations of large fruit size and high quality. While overall production and sizing aligned broadly with expectations, quality fell slightly short due to higher-than-anticipated blemished fruit.

Valencia production for MY 2024/25 is estimated at 205,000 MT, 25,000 MT below the prior year. In addition to the biennial down year, growers report fruit splitting and drop, likely tied to the cooler-than-usual November 2025 conditions. As temperatures rose in early December, the start of summer, the extent of fruit splitting was expected to diminish as harvest progressed.

## Consumption

### MY 2025/26 Orange Consumption

FAS/Canberra forecasts domestic fresh market orange consumption in MY 2025/26 to decline to 175,000 MT, down from an estimated 185,000 MT in MY 2024/25. The reduction is driven primarily by an anticipated decrease in navel orange production due to average to below-average fruit set. This impact on yields is expected to outweigh the increase in the bearing area of navel trees. The lighter fruit set is also expected to result in higher-quality fruit, increasing the share of fruit suitable for export and thereby reducing the volume available for the domestic fresh market.

Consumption for processing is forecast to rise to 225,000 MT in MY 2025/26, up from an estimated 205,000 MT in MY 2024/25. This increase reflects the biennial bearing pattern, with MY 2025/26 anticipated to be an “up year.” In addition, the expected reduction in lower-quality navel fruit in the forecast year will limit the volume diverted to juicing, increasing reliance on Valencia oranges for processing demand.

### MY 2024/25 Orange Consumption

FAS/Canberra estimates domestic fresh orange consumption in MY 2024/25 at 185,000 MT, an increase of 10,000 MT from MY 2023/24. This growth is largely attributable to higher navel orange production and strong national population growth, which has supported greater domestic demand.

Consumption for processing in MY 2024/25 is estimated at 205,000 MT, down from 230,000 MT in the previous year. This decline reflects a biennial “down year” for Valencia production as well as some early-season yield losses caused by fruit splitting.

## Trade

### *Exports*

**MY 2025/26 Orange Exports**

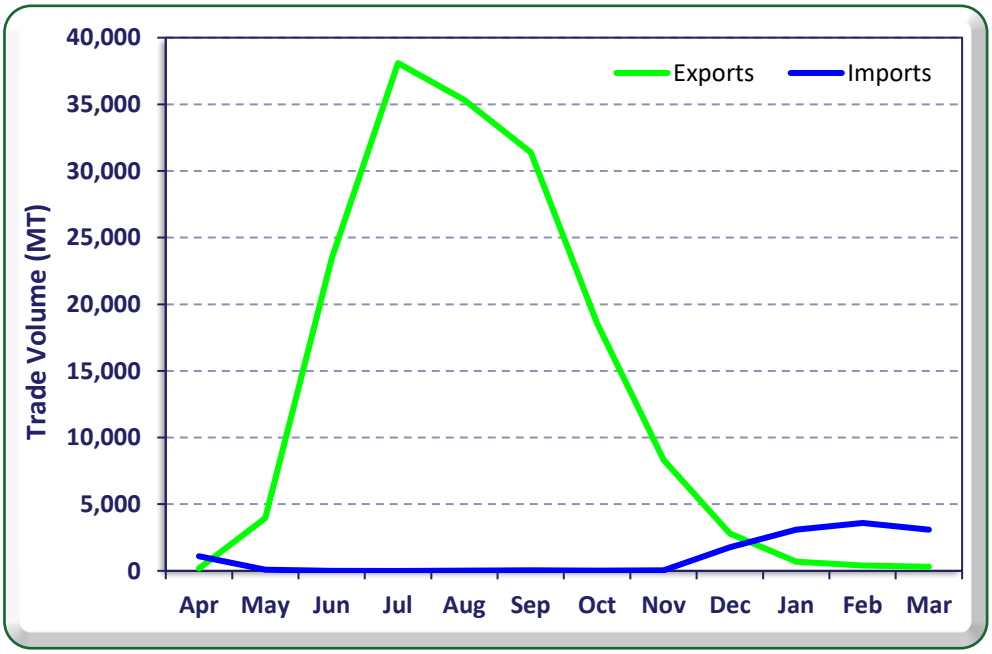
FAS/Canberra forecasts fresh orange exports to reach 200,000 MT in MY 2025/26, matching the estimated record of 200,000 MT in MY 2024/25. These historically high levels are driven by the continued expansion of bearing navel orange plantings. Exports are expected to remain steady despite a forecast 10,000 MT decline in navel production.

Export volumes are primarily influenced by production levels and fruit quality. In years when fruit quality is high, a larger share of the crop meets export specifications, reducing the proportion for domestic consumption and diverted to processing.

Early indications suggest that navel orange quality in MY 2025/26 will exceed that of the previous year. The expected average to below-average fruit set is likely to reduce skin blemishes, improving overall fruit appearance and raising the proportion of fruit suitable for export.

Australian fresh orange exports are strongly seasonal. Small volumes begin shipping in May from northern production areas, with major export activity starting in June as harvest ramps up in the Riverina, Murray Valley, and Riverland regions (see Figure 9). Export volumes typically peak between July and September, gradually tapering through December. This timing allows Australia to supply both nearby low-production Asian markets and counter-seasonal northern hemisphere markets.

**Figure 9 – Seasonality of Australian Fresh Orange Trade (5-year average)**




*Source: Australian Bureau of Statistics*

**MY 2024/25 Orange Exports**

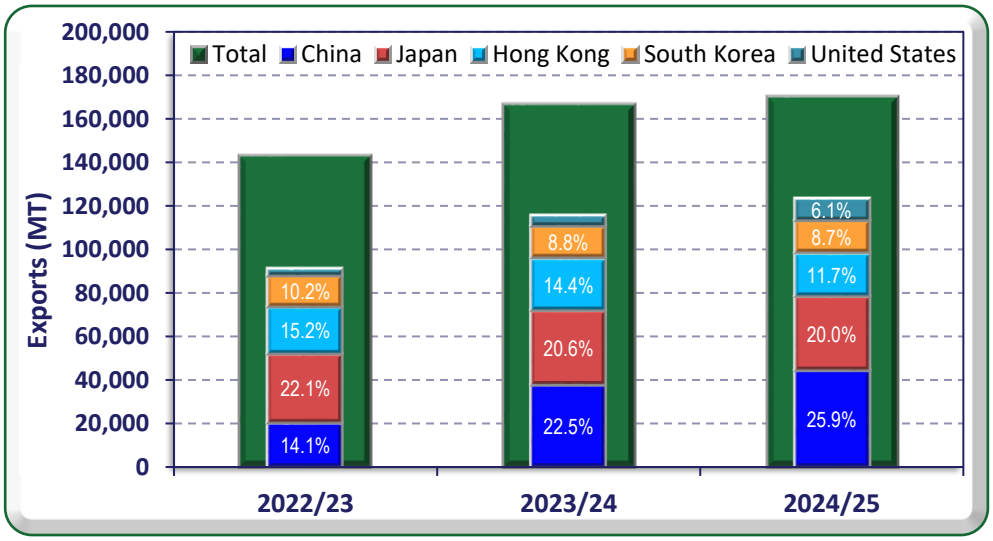
FAS/Canberra has revised its MY 2024/25 export estimate upward to a record 200,000 MT, compared with the forecast of 190,000 MT issued a year earlier. This revision reflects stronger-than-expected production rather than any large improvement in fruit quality. From April to October, shipments totaled 187,600 MT. Historically, the final five months of the marketing year account for about eight percent of annual exports, supporting the updated estimate.

China, Japan, Hong Kong, and South Korea have been Australia's largest export destinations in recent years. Exports to the United States grew significantly in MY 2024/25, making it an increasingly important market. Together, the top four traditional destinations account for nearly two-thirds of total exports, and when including the United States, the top five make up 72 percent of exports (see Figure 10). Overall, Australia exports oranges to more than 40 countries, with most key markets located in Asia.

Exports to China grew sharply in MY 2023/24, reaching 22 percent of total shipments, and continued to strengthen in MY 2024/25, returning China to its position as Australia's largest market—a role it held for five consecutive years before MY 2019/20. Industry feedback suggests sustained demand from China for high-quality, large-sized fruit. MY 2023/24 represented the first high-quality harvest since MY 2019/20, following three years of above-average rainfall that adversely affected quality and yields. Quality in MY 2024/25 was also strong and is expected to improve further in MY 2025/26, supporting continued robust exports to China.

Between MY 2016/17 and MY 2018/19, exports to China ranged from 50,000 to 60,000 MT, comprising 28 to 35 percent of Australia's total orange exports—levels that have not yet been reattained in recent years.

**Figure 10 – Major Orange Exports – Apr-Oct MY 2022/23 to 2024/25**




*Source:* *Australian Bureau of Statistics*

**TRADE ACCESS**

Expanded Access for Australian Citrus to the United States

Australia has trade access for citrus produced in specific regions for export to the United States. This access is mainly from the major orange-producing regions. The Australian citrus industry has requested access for a greater region incorporating mainly mandarin-producing areas. The process is towards the final stages, but a timeline for market access has yet been established.

Over the last five years, Australia has exported from 1,300 MT to over 10,300 MT of oranges and 3,200 MT to 6,800 MT of mandarins per annum to the United States. Further access to the United States for Australia will likely be more significant to the Australian citrus industry than the United Kingdom and Australia free trade agreement that came into force on May 31, 2023. The regions that currently do not have access to the U.S. market mainly produce mandarins, so it is likely that if access was granted that there would be an increase in mandarin exports and little change to orange exports.

## *Imports*

### MY 2025/26 Orange Imports

FAS/Canberra forecasts orange imports to remain steady at 10,000 MT in MY 2025/26, unchanged from the MY 2024/25 estimate. This level is consistent with the trend observed over the past five marketing years.

In contrast, imports in the years prior to the pandemic ranged between 14,000 and 16,000 MT and reached as high as 35,000 MT around 15 years ago. Despite Australia's growing population and the resolution of pandemic-era supply chain disruptions, there is no indication that import demand will return to those higher historical levels in the near term.

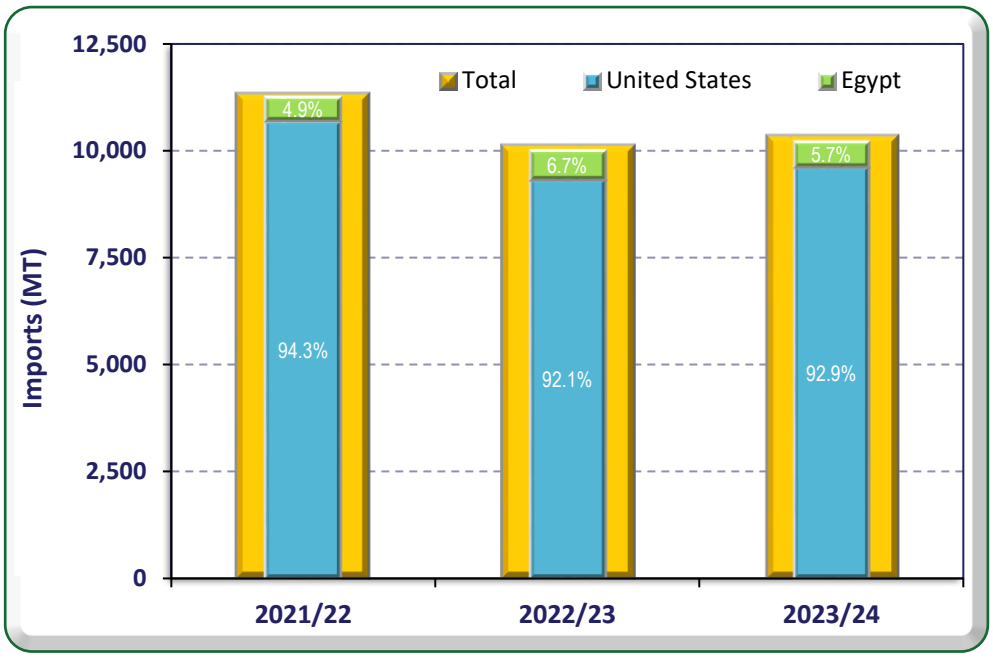
### MY 2024/25 Orange Imports

FAS/Canberra's estimate for MY 2024/25 remains 10,000 MT, unchanged from the forecast issued 12 months earlier. Import volumes have been relatively stable in recent years, with most shipments arriving between December and March, meaning there are limited early indicators for MY 2024/25 trade levels at this stage.

Orange imports from northern hemisphere suppliers arrive counter-seasonally to domestic production, typically occurring from December through April. Nearly all imported navel oranges originate from the United States, with Egypt supplying the remaining five to seven percent (see Figure 11). California—the dominant orange-producing region in the United States—has reportedly experienced a favorable

growing season, with both production and quality expected to improve on the prior year. This is expected to ensure adequate supply to meet Australia's estimated import requirement for MY 2024/25.

**Figure 11 – Major Fresh Orange Imports to Australia MY 2021/22 to 2023/24**




*Source: Australian Bureau of Statistics*

**Table 2 - Production, Supply, and Distribution of Fresh Oranges**

| Oranges, Fresh | 2023/2024 | | 2024/2025 | | 2025/2026 | |
|---|---|---|---|---|---|---|
| Market Year Begins | Apr 2024 | | Apr 2025 | | Apr 2026 | |
| Australia | USDA Official | New Post | USDA Official | New Post | USDA Official | New Post |
| **Area Planted** (HECTARES) | 19000 | 19000 | 19500 | 20000 | 0 | 21000 |
| **Area Harvested** (HECTARES) | 16200 | 16200 | 16600 | 16800 | 0 | 17500 |
| **Bearing Trees** (1000 TREES) | 0 | 0 | 0 | 0 | 0 | 0 |
| **Non-Bearing Trees** (1000 TREES) | 0 | 0 | 0 | 0 | 0 | 0 |
| **Total No. Of Trees** (1000 TREES) | 0 | 0 | 0 | 0 | 0 | 0 |
| **Production** (1000 MT) | 520 | 575 | 545 | 580 | 0 | 590 |
| **Imports** (1000 MT) | 10 | 10 | 10 | 10 | 0 | 10 |
| **Total Supply** (1000 MT) | 530 | 585 | 555 | 590 | 0 | 600 |
| **Exports** (1000 MT) | 180 | 180 | 190 | 200 | 0 | 200 |
| **Fresh Dom. Consumption** (1000 MT) | 150 | 175 | 170 | 185 | 0 | 175 |
| **For Processing** (1000 MT) | 200 | 230 | 195 | 205 | 0 | 225 |
| **Total Distribution** (1000 MT) | 530 | 585 | 555 | 590 | 0 | 600 |
| | | | | | | |
| (HECTARES) ,(1000 TREES) ,(1000 MT) | | | | | | |
| OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query | | | | | | |

# ORANGE JUICE

## Production

### MY 2025/26 Orange Juice Production

FAS/Canberra forecasts orange juice production in MY 2025/26 at 17,300 MT, a 10-percent increase from the MY 2024/25 estimate of 15,700 MT. This growth is primarily driven by expected improvement in Valencia orange production, largely reflecting the biennial bearing cycle following what is shaping up to be a down year in MY 2024/25.

With minimal change in the planted area of Valencia oranges in recent years, year-to-year fluctuations in orange supply for juicing are determined mainly by seasonal conditions and the biennial effect. As the MY 2024/25 Valencia harvest (November to March) is still under way, the principal indicator for MY 2025/26 remains the biennial cycle. Growers report that the MY 2024/25 season is indeed performing as a down year, compounded by some early-season fruit splitting and drop which appears to be caused by cooler-than-usual conditions. The lighter crop load this season is expected to support a rebound in Valencia yields in MY 2025/26, underpinning the production forecast.

### MY 2024/25 Orange Juice Production

FAS/Canberra's estimate for orange juice production in MY 2024/25 has been revised upward to 15,700 MT, compared with the forecast of 15,000 MT issued 12 months earlier. With stable Valencia plantings and generally favorable seasonal conditions, there was little reason to expect significant deviation from earlier production expectations.

For navel oranges—typically a secondary but variable contributor to juice supply—seasonal conditions in MY 2024/25 were highly favorable, resulting in strong overall fruit quality. Consequently, only a small share of navel production was diverted to the processing sector.

## Consumption

### MY 2025/26 Orange Juice Consumption

FAS/Canberra forecasts domestic orange juice consumption in MY 2025/26 at 22,500 MT, representing a modest recovery from the substantially downward-revised estimate of 21,000 MT for MY 2024/25. Despite this improvement, consumption remains well below recent historical levels of more than 24,000 MT.

Industry reports indicate that the decline in demand is primarily the result of significant increases in retail prices, which have dampened consumer demand. The expected rebound in MY 2025/26 is supported by anticipated improvements in domestic production, which may help ease retail prices and stimulate some recovery in consumption. Additionally, global orange juice supply is expected to

strengthen as production in Brazil—typically supplying around two-thirds of world exports—is anticipated to rebound, which may also help reduce upward pressure on import prices.

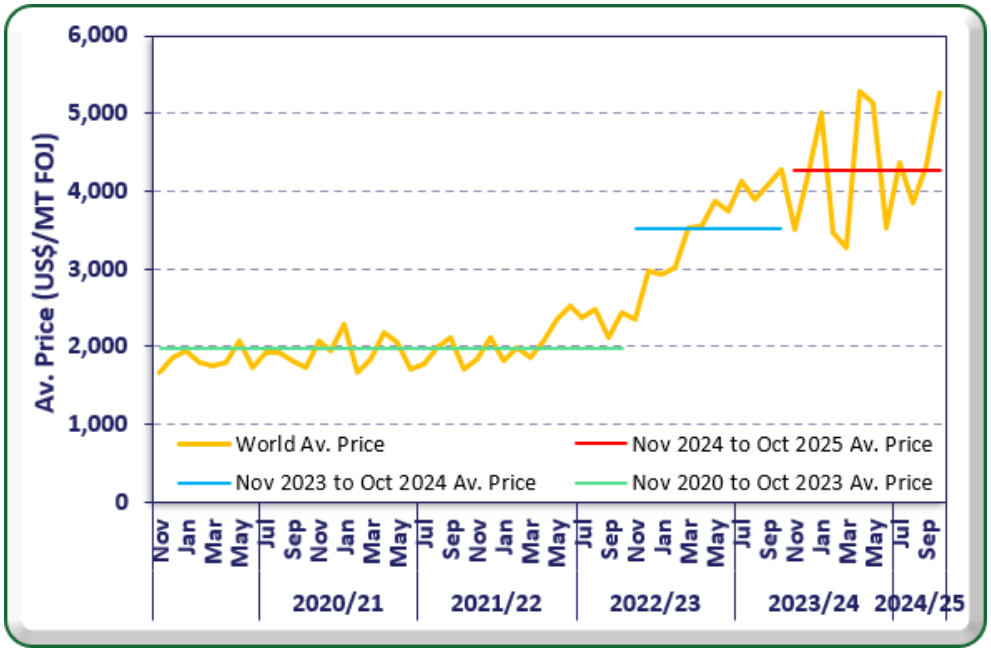
### MY 2024/25 Orange Juice Consumption

The MY 2024/25 orange juice consumption estimate of 21,000 MT represents a downward revision of 3,000 MT from the forecast issued 12 months earlier. Because Australia typically imports around half of its orange juice supply, changes in import volumes and prices have a greater impact on domestic consumption than fluctuations in domestic production alone. As a result, import prices play a major role in determining retail prices and consumer demand.

Processors report that substantial retail price increases in MY 2023/24—driven by tightening global export supplies—prompted consumers to substitute away from orange juice toward lower-cost alternatives. Based on sales trends from the first four months of MY 2024/25, processors indicate that domestic consumption is likely to fall by approximately 15 percent.

The retail price increases mirror a sharp escalation in import prices. After several years of stability, import prices began rising rapidly in late 2023 and have since more than doubled (see Figure 12). Brazil, which typically accounts for around two-thirds of global orange juice exports, experienced a production-driven decline of more than 20 percent in MY 2023/24, followed by a further reduction in export volumes during the first five months of MY 2024/25. Although Australia currently imports little directly from Brazil, the contraction in global supply has driven up international prices, which in turn has raised Australia's import costs.

**Figure 12 – Australian Orange Juice Import Price Trend - Nov 2020 to Oct 2025**




*Source:* *Australian Bureau of Statistics*
*Note:* *FOJ = Frozen Orange Juice equivalent (65-degree brix equivalent)*

Historically, imports during the first four months of the marketing year (July–October) account for roughly one-third of total annual imports. Current import volumes for MY 2024/25 are tracking well below the levels anticipated in FAS/Canberra's forecast from a year prior.

Given that imports supply around half of Australia's domestic orange juice consumption, the significant slowdown in import activity is likely due to sharply higher import prices, which have raised retail prices and contributed to a corresponding decline in consumer demand.

## Trade

### *Exports*

**MY 2025/26 Orange Juice Exports**

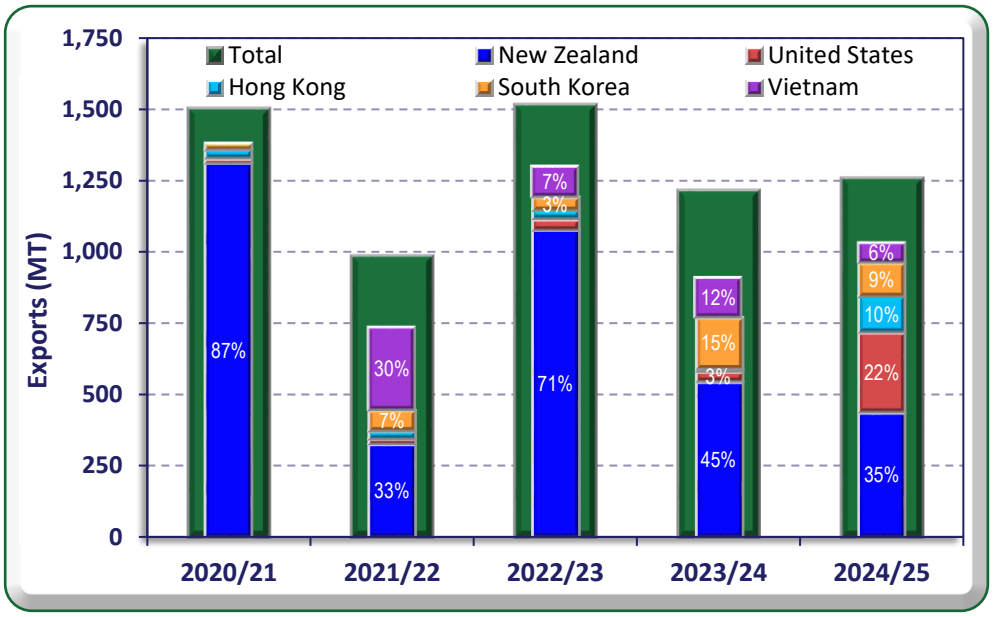
FAS/Canberra forecasts orange juice exports to increase to 4,300 MT in MY 2025/26, up from an estimated 3,800 MT in MY 2024/25. Although higher, this remains a relatively small volume, accounting for less than one-quarter of total production. Export volumes are expected to stay modest because domestic consumption exceeds local production, requiring substantial imports to meet demand. The projected increase in exports is primarily linked to the anticipated rise in domestic orange juice production.

**MY 2024/25 Orange Juice Exports**

The MY 2024/25 orange juice export estimate of 3,800 MT is 500 MT higher than the MY 2023/24 outcome. This increase occurs despite lower domestic production and declining imports, driven largely by elevated global export prices. During the first four months of the marketing year, exports reached 1,260 MT—a period that has historically accounted for around 32 percent of annual exports over the past five years. If this seasonal pattern holds, current export performance is on track to meet the MY 2024/25 estimate.

New Zealand remains Australia's primary export destination for orange juice; however, its share has declined through MY 2023/24 and into MY 2024/25. This trend coincides with significantly reduced supply from Brazil, prompting various countries to seek alternative suppliers (see Figure 13). Over this period, Australia has diversified its export markets, increasing shipments to the United States, Hong Kong, and South Korea. Once global supply pressures ease, exports to these markets are expected to recede, and New Zealand is likely to return as the dominant destination.

**Figure 13 – Major Orange Juice Exports – Jul to Oct MY 2020/21 to 2024/25**




*Source:* *Australian Bureau of Statistics*

## *Imports*

### MY 2025/26 Orange Juice Imports

FAS/Canberra forecasts orange juice imports to reach 9,500 MT in MY 2025/26, an increase of 500 MT over the MY 2024/25 estimate. The expected rise is driven largely by industry expectations of a recovery in Brazil's citrus production, which would boost global supply and moderate international orange juice prices.

### MY 2024/25 Orange Juice Imports

The MY 2024/25 orange juice import estimate of 9,000 MT is 1,300 MT lower than the MY 2023/24 outcome. The decline reflects the adverse seasonal conditions affecting Brazil—typically responsible for around two-thirds of global orange juice exports—which have sharply reduced output. Elevated global import prices (see Figure 12) are flowing through to higher retail prices and constraining domestic demand.

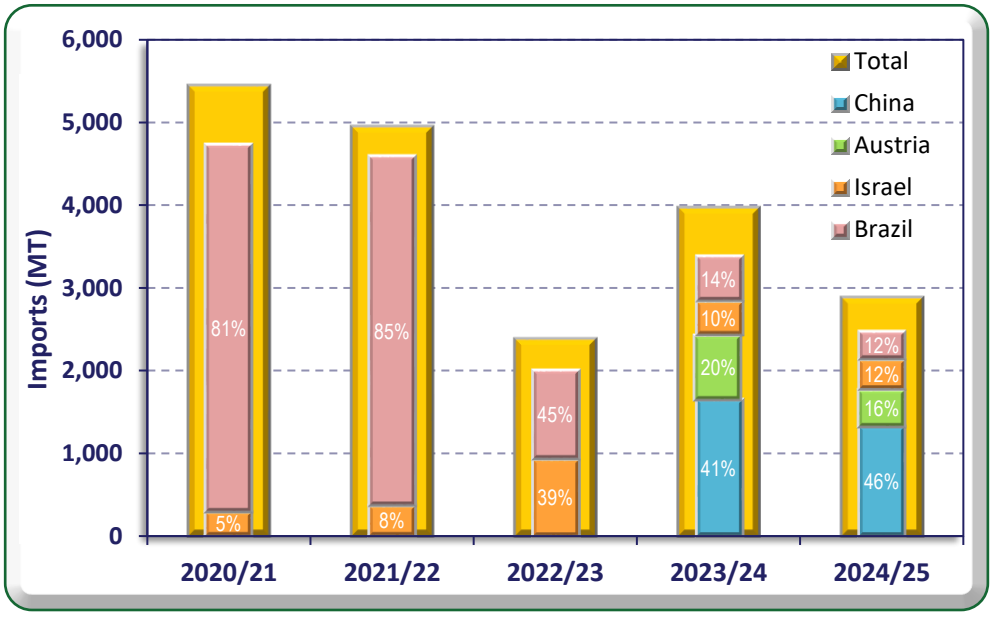
Between July and October 2025, 2,880 MT were imported, a decline of 27 percent from the same period in the previous year. Historically, this period accounts for approximately one-third of the full marketing year's imports. FAS/Canberra anticipates that the pace of imports will improve in the coming months for the MY 2024/25 estimate to be reached.

Global supply constraints and very high international prices are primarily linked to the drought conditions in Brazil, which has restricted irrigation availability and significantly reduced citrus yields.

Additional pressure stems from ongoing citrus greening and citrus canker in Florida, the United States' second-largest orange-producing region, further tightening world supplies.

Brazil has traditionally been Australia's dominant supplier of orange juice, typically accounting for more than 80 percent of imports (see Figure 14). However, drought-related production losses have sharply reduced Brazil's export availability. Australian importers initially increased shipments from Israel, though this only partly offset the deficit in MY 2022/23. Across MY 2023/24 and the first four months of MY 2024/25, China has supplied nearly half of Australia's imports, with Austria also emerging as a notable source.

**Figure 14 – Australian Orange Juice Imports – Jul to Oct MY 2020/21 to MY 2024/25**




*Source: Australian Bureau of Statistics*

**Table 3 - Production, Supply, and Distribution of Orange Juice**

| Orange Juice | 2023/2024 | | 2024/2025 | | 2025/2026 | |
|---|---|---|---|---|---|---|
| Market Year Begins | Jul 2024 | | Jul 2025 | | Jul 2026 | |
| Australia | USDA Official | New Post | USDA Official | New Post | USDA Official | New Post |
| **Deliv. To Processors** (MT) | 200000 | 230000 | 195000 | 205000 | 0 | 225000 |
| **Beginning Stocks** (MT) | 876 | 876 | 676 | 876 | 0 | 776 |
| **Production** (MT) | 15300 | 17600 | 15000 | 15700 | 0 | 17300 |
| **Imports** (MT) | 12000 | 10300 | 13000 | 9000 | 0 | 9500 |
| **Total Supply** (MT) | 28176 | 28776 | 28676 | 25576 | 0 | 27576 |
| **Exports** (MT) | 4000 | 3300 | 4000 | 3800 | 0 | 4300 |
| **Domestic Consumption** (MT) | 23500 | 24500 | 24000 | 21000 | 0 | 22500 |
| **Ending Stocks** (MT) | 676 | 876 | 676 | 776 | 0 | 776 |
| **Total Distribution** (MT) | 28176 | 28676 | 28676 | 25576 | 0 | 27576 |
| | | | | | | |
| (MT) | | | | | | |
| OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query | | | | | | |

# FRESH TANGARINES/MANDARINS

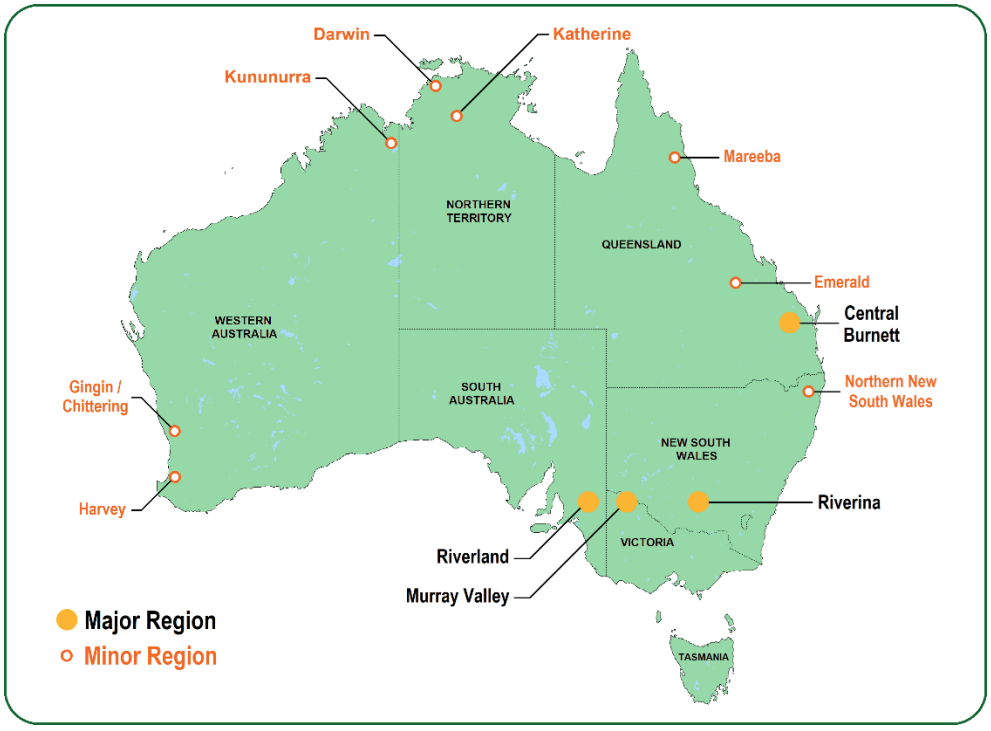
## Industry Background

Commercial-scale mandarin production, similar to oranges, began in the late nineteenth and early twentieth centuries following the development of major irrigation schemes in the Murray Valley and Riverland regions, and later in the Riverina. In the mid-twentieth century, production expanded rapidly in Queensland's Central Burnett region. These areas remain Australia's core mandarin-producing regions today.

Since that time, mandarin and tangerine production has diversified substantially and is now more geographically dispersed than orange production. While some tangerines are produced in Australia, the planted area is minimal; nearly all production is mandarins.

Queensland is the dominant producing state, with 4,832 hectares, representing 50 percent of national plantings (see Figure 15). Victoria's Murray Valley is the second-largest region with 1,989 hectares (21 percent), followed by South Australia's Riverland with 1,491 hectares (15 percent). Within Queensland, the Central Burnett region—around Gayndah and Mundubbera—accounts for the bulk of output, with additional production in Emerald (Central Queensland) and Mareeba (Far North Queensland). Smaller producing areas are located in northern New South Wales, the Northern Territory, and Western Australia.

**Figure 15 – Tangerine/Mandarin Production Regions in Australia**




*Source: Citrus Australia / Australian Bureau of Statistics Census / FAS/Canberra*

## *Harvest Periods*

Australia's mandarin harvest is concentrated from June to September, but the wide geographic distribution of production results in an extended harvest window running from March through October (see Table 4).

**Table 4 – Mandarin Harvest Seasonality in Australia**

| Mandarin Harvest Seasonality in Australian | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **State** | **Apr** | **May** | **Jun** | **Jul** | **Aug** | **Sep** | **Oct** | **Nov** | **Dec** | **Jan** | **Feb** | **Mar** |
| Queensland | | | | | | | | | | | | |
| South Australia | | | | | | | | | | | | |
| Victoria | | | | | | | | | | | | |
| New South Wales | | | | | | | | | | | | |
| Western Australia | | | | | | | | | | | | |

*Availability:* *High* *Medium* *Low*

*Source:* *Horticulture Innovation Australia*

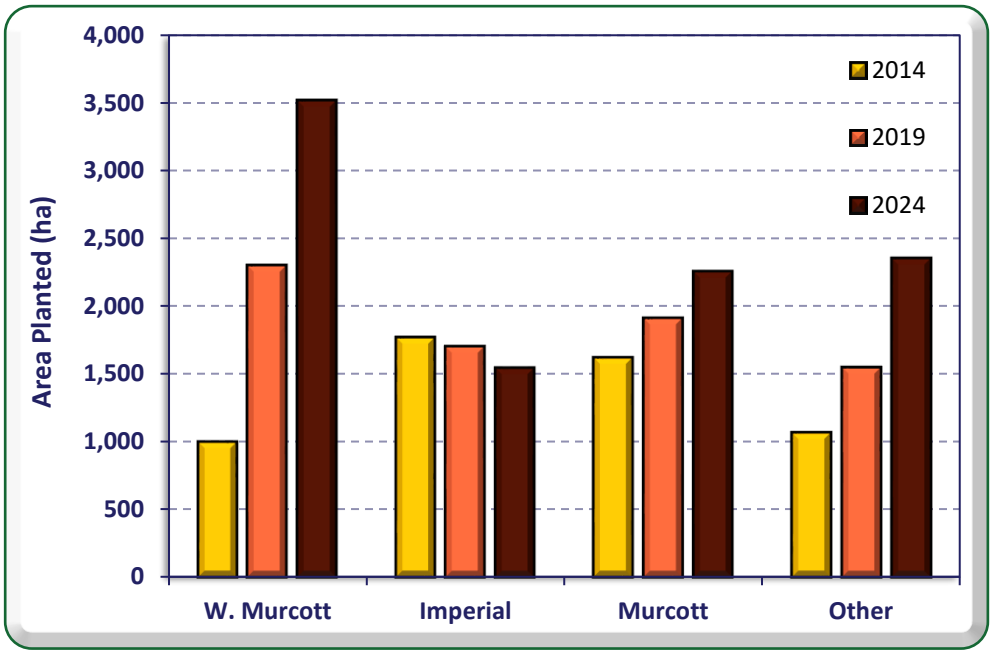
## *Trends in Planting Area*

Between 2014 and 2024—the period for which annual tree census data is available—the national mandarin planting area increased 78 percent, rising from 5,451 hectares to 9,681 hectares. This represents both a stronger growth rate and a larger absolute increase than observed for oranges over the same period. Importantly, expansion has occurred across nearly all major producing regions.
The W. Murcott group (seeded and seedless), also known as Afourer, has seen the most significant growth, with plantings increasing from 998 hectares to 3,517 hectares. It is now the dominant mandarin type grown in Australia (see Figure 16). The Murcott category (including low-seeded Honey Bee and Royal Honey) expanded by 40 percent, while the older Imperial varieties (including Goldup and Avana) declined by 12 percent. The "other" category—comprising 35 varieties including tangelos—grew by 120 percent (up 1,289 hectares), with the largest increases in newer low-seed or seedless varieties such as Daisy, Phoenix, and Tango.

The growth in mandarin plantings is also reflected in the maturity profile of the national tree population. The area of non-bearing trees (0–4 years) increased by 1,539 hectares to 2,517 hectares, a rise of 157 percent between 2014 and 2024 (see Figure 17). However, new plantings have levelled off over the last five years. The area of entering-production trees (5–12 years) continued to expand sharply over the past two years, rising by 972 hectares (37 percent), and now represents more than one-third of total plantings.

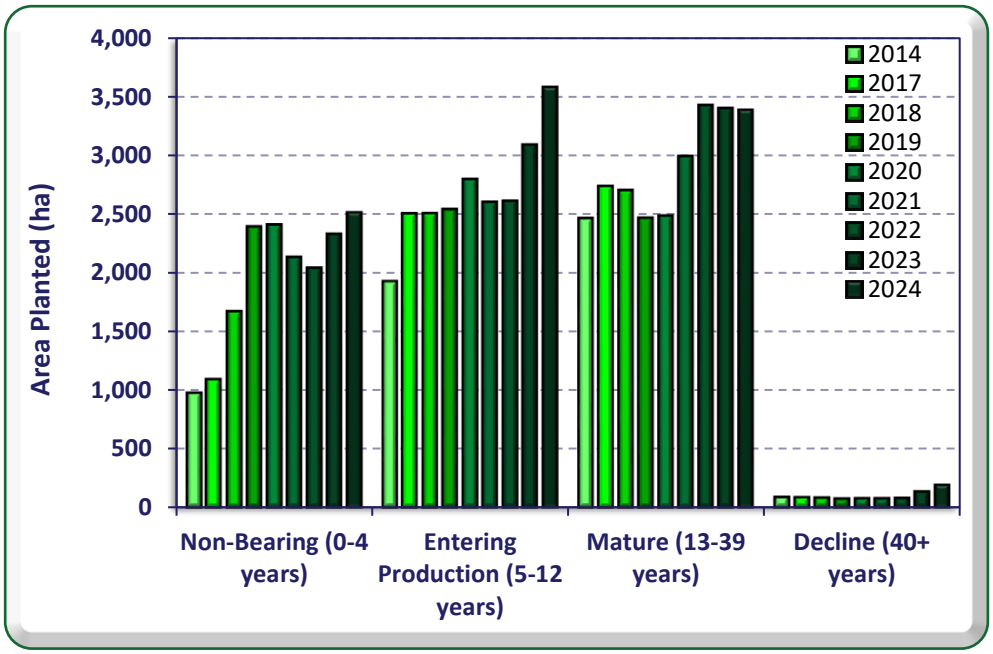
The area of mature trees (13–39 years) increased by 928 hectares (38 percent) over the decade, with the largest gains occurring in the past three years. With one-quarter of the national mandarin area classified as non-bearing in 2024 and negligible area in the declining age class (40+ years), the industry is positioned for continued increases in production as young trees progress into full bearing.

**Figure 16 – Change in Mandarin Plantings 2014 to 2024**




*Source:* *Citrus Australia / Horticulture Innovation Australia*
*Notes:* *# Includes low seeded*

**Figure 17 – Change in Mandarin Maturity Profile 2014 to 2024**




*Source:* *Citrus Australia / Horticulture Innovation Australia*

## Production

### MY 2025/26 Tangarine/Mandarin Production

FAS/Canberra forecasts tangerine/mandarin production to rise to a new record of 270,000 MT in MY 2025/26, representing a six-percent increase from the MY 2024/25 estimate of 255,000 MT. The continued expansion is driven primarily by the substantial growth in planted area over the last decade. If realized, MY 2025/26 would mark the sixth consecutive year of record national production.

As noted earlier, mandarin plantings have expanded sharply since 2018, with sustained increases in new plantings that remain non-bearing for the first four years. These plantings are now moving into the bearing phase, contributing to a significant rise in the area entering production from 2024 onward. In parallel, the area of mature trees also increased considerably from 2022 and is expected to continue rising. Notably, the area of trees entering production (5–12 years old) is now roughly equal to the area of mature trees (13–39 years old) (see Figure 17).

Even without further increases in planted area, the large cohort of young trees maturing into full production is expected to drive further growth for several years. This dynamic underpins the record forecast for MY 2025/26 and suggests that new production highs are likely in subsequent years, assuming average seasonal conditions.

Grower reports indicate that, similar to orange producers in the Murray Valley and Riverland regions, an exceptional flowering phase has been followed by average to below-average fruit set and smaller-than-expected fruit size. However, the impact on national production is expected to be more limited for mandarins because production is far more geographically dispersed. The Murray Valley and Riverland together account for approximately 36 percent of national mandarin output, compared with a much larger share of national orange output.

In contrast to the major orange-producing regions, where high tradeable irrigation water prices are expected to constrain production, much of Australia’s mandarin crop is produced in Queensland. Water storages in Queensland remain in strong condition following several years of average to above-average wet-season rainfall. As with oranges, growers are also expected to benefit from more stable fertilizer markets and improved crop protection costs in the forecast year.

### MY 2024/25 Tangarine/Mandarin Production

The MY 2024/25 mandarin production estimate of 255,000 MT is 30,000 MT higher than the forecast made 12 months earlier and 25,000 MT higher than the MY 2023/24 outcome. This upward revision is largely attributable to favorable seasonal conditions across most producing regions and an 8.1-percent increase in the area of bearing-age trees—slightly higher than previously anticipated.

## Consumption

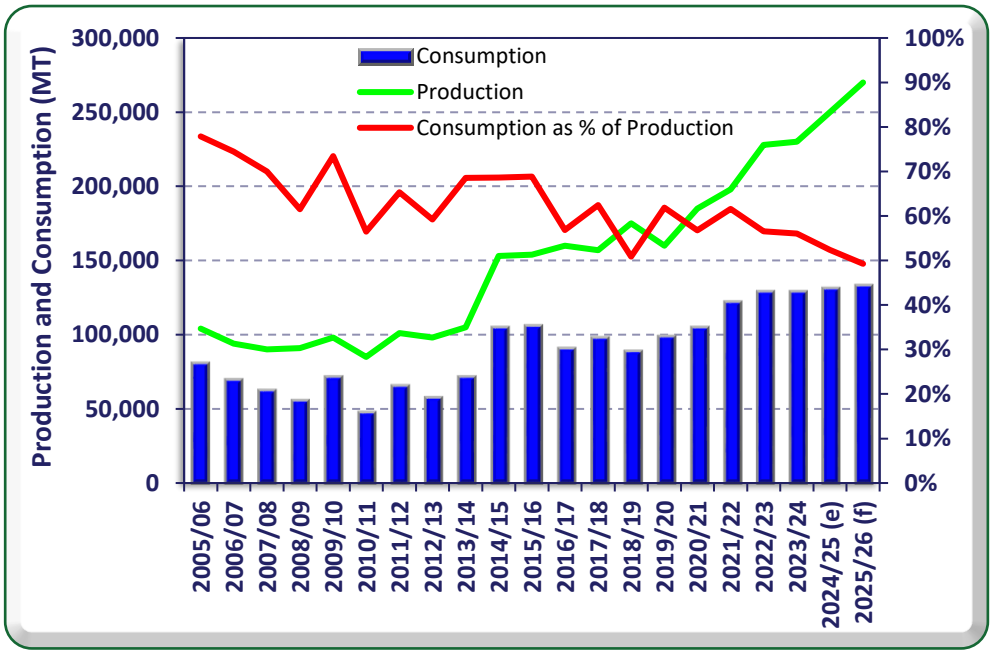
### MY 2025/26 Tangarine/Mandarin Consumption

FAS/Canberra forecasts domestic mandarin consumption at 133,000 MT for MY 2025/26, a 1.6-percent increase over the MY 2024/25 estimate. This growth is broadly consistent with expected population growth in Australia.

Domestic mandarin consumption is largely driven by supply availability, which reflects both production volume and fruit quality. In years of high-quality output, a greater share of mandarins is typically directed to higher-value export markets, reducing the volume available domestically. However, as national production is expanding at a substantially faster rate than population growth, the degree to which export prioritization constrains domestic supply is diminishing over time.

Two decades ago, Australia consumed approximately three-quarters of its mandarin production; a decade ago, this had declined to about two-thirds. For MY 2025/26, domestic consumption is forecast to represent around half of total production—despite both production and consumption rising over the period (see Figure 18). As production continues to outpace population growth in the coming years, domestic consumption is expected to account for a progressively smaller share of total output.

**Figure 18 –Mandarin Production and Consumption Trend**




*Source:* *PSD Online*

**MY 2024/25 Tangarine/Mandarin Consumption**

The MY 2024/25 domestic consumption estimate is 131,000 MT, slightly above the MY 2023/24 level and broadly aligned with Australia's population growth rate.

## Trade

### *Exports*

**MY 2025/26 Tangarine/Mandarin Exports**

FAS/Canberra forecasts mandarin exports to increase by 10 percent to a new record of 133,000 MT in MY 2025/26, surpassing the likely record estimate of 120,000 MT in MY 2024/25. This growth continues to be driven by the expansion in planted area and the steady progression of young trees into full bearing capacity, both of which are expected to support new record-breaking production and export volumes in the years ahead.

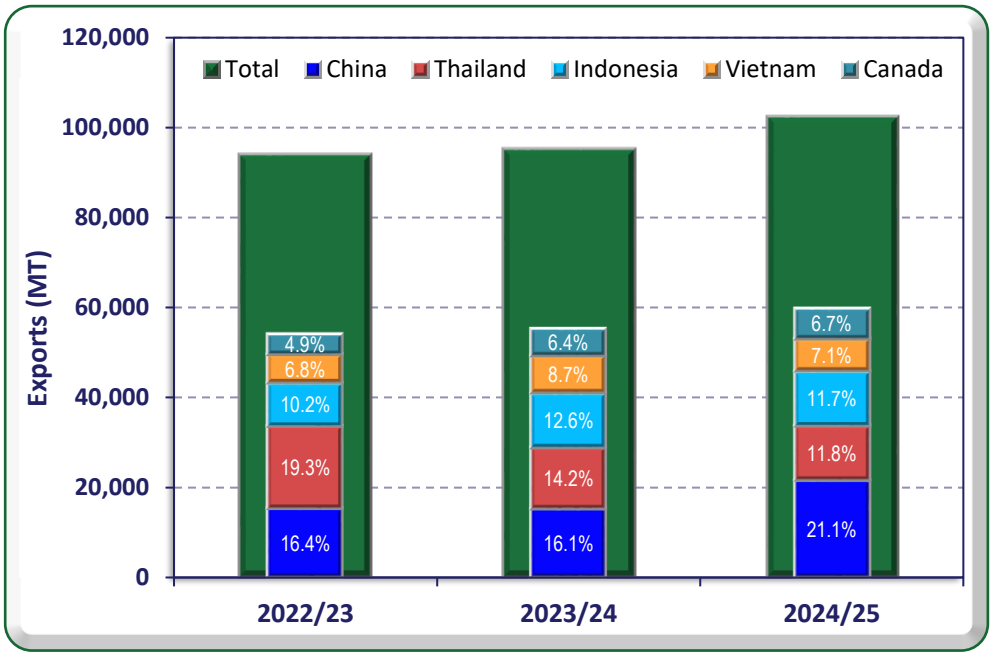
Australian mandarin exports are distributed across roughly 40 markets, with the top ten destinations accounting for about 85 percent of total exports over the past three years. Although the trade profile has historically been diversified, China is increasingly emerging as the dominant export market.

**MY 2024/25 Tangarine/Mandarin Exports**

The MY 2024/25 export estimate has been revised upward to 120,000 MT, compared with the initial forecast of 105,000 MT made 12 months earlier. This revision reflects substantially higher production than previously anticipated. Between April and October 2025, exports totaled 119,000 MT, representing nearly 99 percent of the average full-year export volume and exceeding the prior-year record of 96,500 MT by 23 percent.

China and Thailand have historically been the two leading destinations. However, in MY 2024/25, China has clearly emerged as the dominant market, with exports increasing sharply in both volume and share. Over the same period, exports to Thailand have softened across the last two marketing years (see Figure 19). Indonesia and Vietnam remain important destinations, and exports to Canada have grown in recent years. The remaining top-ten markets each account for roughly five percent of total exports, underscoring the sector's broad market reach.

**Figure 19 – Mandarin Export Destinations – Apr-Oct MY 2022/23 to MY2024/25**




*Source:* *Australian Bureau of Statistics*

## *Imports*

### MY 2025/26 Tangarine/Mandarin Imports

FAS/Canberra forecasts mandarin and tangerine imports at 1,000 MT for MY 2025/26, consistent with recent years. Historically, imports averaged about 4,000 MT annually, but volumes declined sharply to 1,000 MT in MY 2022/23 and have shown no signs of recovery. These counter-seasonal imports supplement the limited demand that arises during the period when domestic supply is seasonally unavailable. Imports represent approximately one percent of domestic production and two percent of domestic consumption.

### MY 2024/25 Tangarine/Mandarin Imports

The MY 2024/25 import estimate remains unchanged at 1,000 MT, in line with outcomes for the previous two marketing years.

## Table 5 - Production, Supply, and Distribution of Fresh Tangerines and Mandarins

| Tangerines/Mandarins, Fresh | 2023/2024 | | 2024/2025 | | 2025/2026 | |
|---|---|---|---|---|---|---|
| Market Year Begins | Apr 2024 | | Apr 2025 | | Apr 2026 | |
| Australia | USDA Official | New Post | USDA Official | New Post | USDA Official | New Post |
| **Area Planted** (HECTARES) | 8900 | 8900 | 9500 | 9700 | 0 | 9300 |
| **Area Harvested** (HECTARES) | 6600 | 6600 | 7000 | 7200 | 0 | 7600 |
| **Bearing Trees** (1000 TREES) | 0 | 0 | 0 | 0 | 0 | 0 |
| **Non-Bearing Trees** (1000 TREES) | 0 | 0 | 0 | 0 | 0 | 0 |
| **Total No. Of Trees** (1000 TREES) | 0 | 0 | 0 | 0 | 0 | 0 |
| **Production** (1000 MT) | 210 | 230 | 225 | 255 | 0 | 270 |
| **Imports** (1000 MT) | 2 | 1 | 2 | 1 | 0 | 1 |
| **Total Supply** (1000 MT) | 212 | 231 | 227 | 256 | 0 | 271 |
| **Exports** (1000 MT) | 97 | 97 | 105 | 120 | 0 | 133 |
| **Fresh Dom. Consumption** (1000 MT) | 111 | 129 | 118 | 131 | 0 | 133 |
| **For Processing** (1000 MT) | 4 | 5 | 4 | 5 | 0 | 5 |
| **Total Distribution** (1000 MT) | 212 | 231 | 227 | 256 | 0 | 271 |
| | | | | | | |
| (HECTARES) ,(1000 TREES) ,(1000 MT) | | | | | | |
| OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query | | | | | | |

## Attachments:

No Attachments