

Required Report: Required - Public Distribution

Date: December 19, 2025

Report Number: CH2025-0244

Report Name: Citrus Annual

Country: China - People's Republic of

Post: Guangzhou ATO

Report Category: Citrus

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Report Highlights:

China's production of citrus fruit will grow modestly in marketing year (MY) 2025/26 as consumer demand continues to drive investment in the sector and weather conditions have been generally favorable. Production of mandarins/tangerines were robust in southern China due to good weather. Orange and pomelo production are both relatively flat, but with improved quality over MY 2024/25 which may improve China's export competitiveness. Due to a shortage of Brazilian frozen orange juice concentrate in MY 2024/25, China increased its processing of domestic oranges for juice, a trend which is forecast to persist in 2025/26 despite lower global export prices.

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CITRUS PRODUCTION OVERVIEW

Figure 1: China Citrus Production Area – 2024



(Source: 2025 China Statistic Yearbook, ATO Guangzhou chart)

Southern Region: ■ = Guangxi and Guangdong ■ = Fujian ■ = Yunnan & Guizhou

Central Region: ■ = Jiangxi ■ = Hunan & Hubei.

Western: ■ = Sichuan & Chongqing

China is one of the world’s largest producers of citrus fruits. The sector is relatively fragmented by region, province, and type of fruit produced. Citrus is grown across much of the southern third of China. For this report, FAS China has divided China’s citrus growing provinces into the southern, central, and western regions (figure 1).

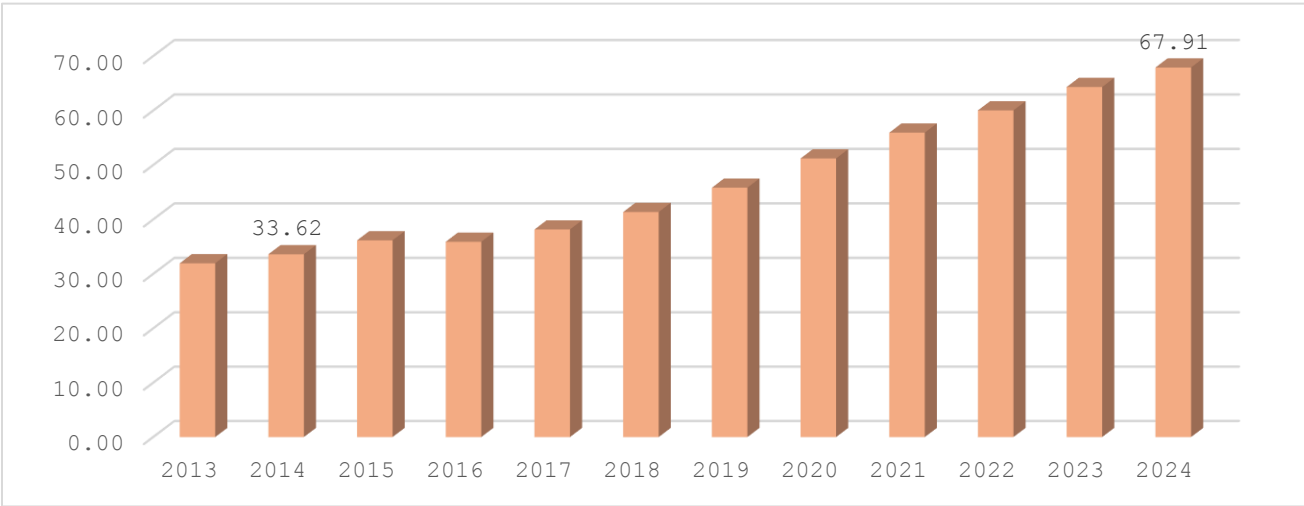
China’s southern region the country’s core citrus-producing belt, accounting for more than half of total national output. Guangxi and Guangdong continue to hold the largest planted areas and dominate production of major mandarin and tangerine varieties such as *Wogan*, *Shatangju*, and *Huangdigan*. Fujian contributes roughly one-tenth of national citrus production and features a diversified varietal mix, including pomelos, mandarins, and tangerines. Guangdong’s Meizhou and Fujian’s Pinghe counties are the leading production centers for pomelos and grapefruits. Yunnan and Guizhou have emerged as expanding citrus regions and now account for over six percent of annual output. Yunnan, benefiting from favorable climate and soils, primarily produces *Bingtang* oranges and *Wogan* tangerines and is also the origin of the well-known “Chu” orange brand.

The central Yangtze River basin—encompassing Jiangxi, Hunan, and Hubei—represents approximately one-third of China’s total citrus crop. Jiangxi remains one of the country’s most prominent production bases, underpinned by the scale and commercial significance of its late-maturing navel orange industry. Hubei has seen increasing investment in navel orange cultivation in response to strong market returns, while Hunan produces both navel oranges and blood oranges. Traditional varieties, particularly Nanfeng tangerines, continue to maintain a significant presence in both Jiangxi and Hunan.

Western production areas, including Sichuan and Chongqing, contribute around 16 percent of national citrus output. Sichuan produces a broad range of tangerine cultivars - such as *Buzhihuo*, *Aiyuan*, *Chunjian*, and *Mirijian* - while Chongqing specializes in late-maturing orange varieties grown near the Three Gorges area. Smaller, scattered producing provinces such as Zhejiang and Shaanxi together account for roughly five percent of national output. Niche varieties, including Zhejiang’s increasingly popular “*Red Beauty*” tangerine, remain limited in volume but continue to gain market attention.

China has not published official production estimates for individual fruits since 2018, instead publishing only total citrus production. Per the latest 2025 China Statistic Yearbook, China’s total citrus production reached 67.91 million metric tons (MMT) in 2024. Over the last 10 years, Chinese official statistics indicate that citrus production has grown by 88 percent. However, USDA FAS estimates for the three fruits in this report (oranges, grapefruit, and tangerines/mandarins) only show 26 percent growth over 10 years. Other citrus fruits produced in China, including lemons, limes, and sour oranges, may account for some of the difference. Detailed and authoritative sources for individual commodities are not available.

Chart 1: China’s Citrus Production (CY 2013-2024), Million Metric Tons



(Source: China Statistic Yearbook, 2025, ATO Guangzhou chart).

While the exact scale of the growth of Chinese citrus production is uncertain, the trend is clear, and China has moved steadily from a net citrus importer to an important regional citrus exporter. Post expects citrus production to keep growing and outperform apples, pears, and other fruit categories, driven by sustained domestic demand for high-sugar, seedless, and easy-to peel hybrid varieties. Nonetheless, growth is likely to slow modestly as labor costs rise, and land availability tightens.

CITRUS TRADE POLICY

Exports: In **August 2025**, New Zealand granted official market access for **Chinese pomelos**. In **2020**, the United States approved imports of several Chinese citrus products, including **Nanfeng honey mandarins, pomelos, sweet oranges, and satsuma mandarins**.

Key GACC announcement is available here:

[List of China GACC Approved establishments to export citrus to China](#)

Imports: The General Administration of Customs of China (GACC) granted official citrus market access to Uruguay (effective December 1, 2022) and Zimbabwe (effective May 30, 2023). The list of countries eligible to ship to China includes Argentina, Australia, Chile, Cyprus, Egypt, Italy, Iran, Israel, Laos, Morocco, Nepal, New Zealand, Pakistan, Peru, South Africa, Spain, Tajikistan, Thailand, United States, Uruguay, Uzbekistan and Zimbabwe. In contrast, GACC suspended citrus imports from Taiwan (effective August 2022), citing insect infestations found in several shipments.

Table 5. China: Tariff on U.S. citrus products in December 2025

HS Code (8-digit)	Product Description	MFN Rate	Section 232 Retaliation	Section 301 Retaliation	SCTC Ann. No. 2, March 10, 2025	SCTC Ann. No. 7, May 13, 2025	Total Projected Tariff	Total Applied Tariff with 301 Exclusion
8051000	Oranges, Fresh Or Dried	11%	15%	30.00%	0%	10%	66.00%	36.00%
8052110	Chiao-Kan, Fresh or Dried	12%		30.00%	0%	10%	52.00%	22.00%
8052190	Other Mandarins, Fresh or Dried	12%	15%	30.00%	0%	10%	67.00%	37.00%
8052200	Clementines, fresh or dried	12%	15%	30.00%	0%	10%	67.00%	37.00%
8052900	Wilkins And Similar Citrus Hybrids	12%	15%	30.00%	0%	10%	67.00%	37.00%
8054000	Grapefruit, Including Pomelos, Fresh Or Dried	12%	15%	30.00%	0%	10%	67.00%	37.00%

Source: GACC, FAS China

Tariffs: U.S. citrus has been subject to **retaliatory tariffs** since 2018. As of **November 10, 2025**, tariffs were lowered and importers of U.S. citrus products are now required to pay tariffs of up to **37 percent**, which is significantly higher than rates applied to other foreign suppliers. Beginning in November 2025, traders may continue to apply for **tariff exclusion waivers** through **November 11, 2026**, pending further official notice.

Background: China has implemented several rounds of retaliatory tariffs against U.S. products, including fresh citrus fruits, since February 2025 (refer to USDA GAIN report [CH2025-0164](#)). On November 5, 2025, the Chinese government removed the 10 percent retaliatory tariffs imposed on U.S. fruits effective on November 10, 2025 (see USDA GAIN report [CH2025-0209](#)). However, the 10 percent reciprocal tariffs on all products from the United States, including fruits, remain in place. In addition, the exclusion process for Section 301 retaliatory tariffs is set to continue until November 11, 2026. This exclusion process has allowed importers to apply for exemptions from these tariffs since March 2020. Should this process end as scheduled, an additional tariff of 30 percent will be imposed on top of the already existing rates (see GAIN report [CH2025-0153](#)).

CITRUS MARKETING

Citrus is a major fruit category in China, with sales of oranges, tangerines, and mandarins peaking from November to the Spring Festival, and pomelos and grapefruits promoted in the fall. Historically, consumers in first and second tier cities are willing to pay a premium for premium products. Gift-oriented packaging, private labels, and new hybrid varieties (especially seedless and easy-to-peel types) are gaining traction. Consumers weigh freshness, appearance, taste, sweetness, brand, origin, and price, with notable regional differences: for example, Northern buyers prefer smaller, lower-priced oranges and remain more price-sensitive.

Retail stores and online sales distribution channels are rapidly evolving. Citrus fruits with balanced sweet to tart ratio are in high demand. The fast development of fresh delivery throughout the supply chain is critical for maintaining the quality of fresh citrus before they are delivered to customers.

Strong online competition and offline promotions, especially on JD.com, Tmall, WeChat, Douyin, and community-purchase platforms, are reshaping citrus marketing. High-end retailers such as Sam's Club, Costco, Hema, and specialized fruit chains continue to drive demand for premium, well-branded products, while ordinary fruit is sold mainly through mass-market supermarkets and small vendors. Some vendors have found success creating platforms (both on and offline) for community purchases, where residents of the same neighborhood or building can combine their orders to receive a lower price for a larger volume. In addition, farmers are working to maximize their profit margins by selling their citrus directly to consumers with the use of various digital platforms.

Wholesale distribution continues to play a critical role. While Guangzhou *Jiangnan* and Shenzhen *HiGreen* dominate the citrus wholesale business in the south, Shanghai *Huizhan* remains the key hub for East China imports and Beijing *Xinfadi* and Dalian support Northern and Northeastern distribution. In past years, branded items were particularly popular, but December sales of these product lines are slower this year as a result of slower economic growth and the proliferation of new distribution channels.

U.S. Citrus

U.S. citrus fruit imports to China faces four interlocking challenges: high tariffs on U.S. citrus fruits, consumers' focus on value-for-money, increasingly competitive domestic varieties supported by improved quality and marketing systems, and aggressive promotion from international brands. Non-tariff barriers and uncertainty in U.S.–China trade further constrain imports. Innovative marketing, livestreaming, seasonal campaigns, strategic retailer partnerships, and premium packaging remain essential for maintaining brand visibility and premium positioning.

ORANGES

Table 1. China: Production, Supply and Distribution for Oranges

Oranges, Fresh	2023/2024		2024/2025		2025/2026	
Market Year Begins	Nov 2023		Nov 2024		Nov 2025	
China	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	816530	816530	816500	816500	0	816500
Area Harvested (HECTARES)	0	0	0	0	0	0
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)	7630	7630	7620	7620	0	7680
Imports (1000 MT)	161	161	150	161	0	161
Total Supply (1000 MT)	7791	7791	7770	7781	0	7841
Exports (1000 MT)	158	158	160	147	0	150
Fresh Dom. Consumption (1000 MT)	7408	7408	7380	7233	0	7291
For Processing (1000 MT)	225	225	230	400	0	400
Total Distribution (1000 MT)	7791	7791	7770	7781	0	7841

Unit: hectares (HA), metric ton (MT)

Production

Post estimates China's orange production at **7.68 million metric tons (MMT)** in marketing year (MY) 2025/26, a slight increase from the MY2024/25 estimate, reflecting a naturally larger biannual crop in the central region, despite the unfavorable weather challenges encountered in western areas, particularly Sichuan & Chongqing area. Improvements in cultivar structure, standardized orchard management, and enhanced post-harvest handling have strengthened the competitiveness of **Jiangxi's "Gannan" navel oranges** – oranges produced in the southern region around Ganzhou city – in both domestic wholesale markets and premium retail channels. Traders reported that in early December, Gannan navel oranges exhibited notably high quality, characterized by strong juiciness, elevated Brix levels, and a well-balanced sweet–acid profile.

Driven by sustained market profitability in recent years, more growers in Hubei have invested in navel orange production. Over the past decade, plantings of navel oranges and blood oranges have expanded, particularly in Yichang (Hubei) and in Huaihua, Xiangxi, and western Hunan. **“Bingtang” oranges**, typically round shaped, are primarily produced in Hunan and Yunnan. These developments illustrate a broader regional shift toward late-season, high-Brix, and differentiated orange products.



Gannan navel oranges at Guangzhou Jiangnan wholesale market in early December. (Source: ATO Guangzhou)

Prices

Traders reported that average orchard prices for oranges in Jiangxi will be slightly down from the previous year at RMB3.2 – RMB4.4 (\$0.44 to \$0.60) per kilogram. In early December, the wholesale prices of Navel oranges in Southern Jiangxi are between RMB5.60 to RMB 6.20 (\$0.77 - \$0.86) per kilogram. The retail prices for premium domestic oranges remain stable in high-end retail stores. However, the overall price for Gannan oranges sold in ordinary supermarkets is relatively lower than last year. In early December, authentic Gannan navel oranges were sold at RMB46- RMB120 (\$6.3 – \$16.6) per 5-kilo box on digital shopping platforms. The average wholesale price for **“Bingtang”** oranges in early December is around RMB 4.2 – RMB 6.00 (\$0.58 - \$0.83) per kilogram. The retail price varies significantly depending on different origins and brands. In early December, **“Chu”** brand of **“bingbang”** oranges produced in Yunnan were sold at RMB128 to RMB198 (\$17.7 to \$27.5) per box (5 kilogram each).

Consumption

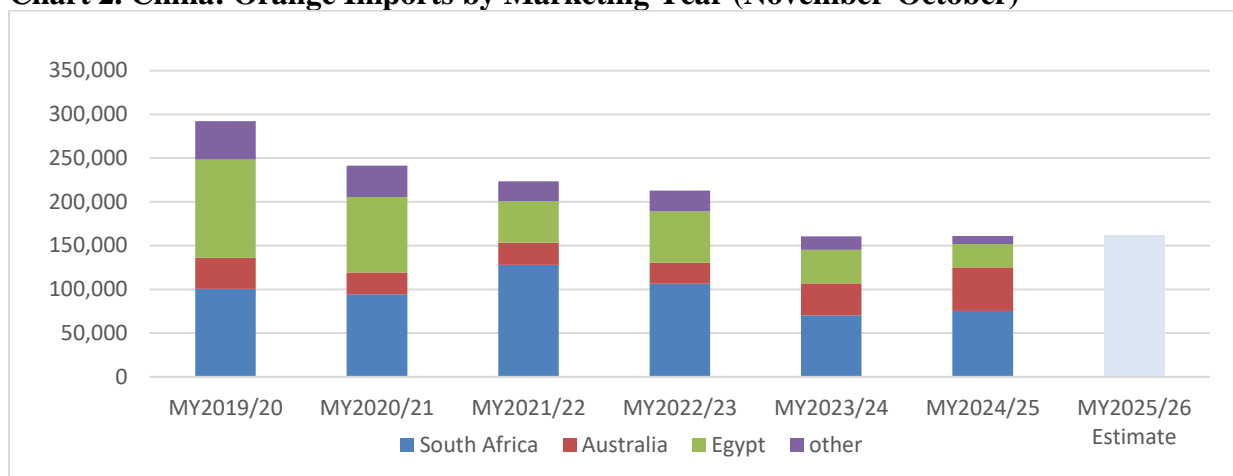
Fresh orange consumption for MY2025/26 is forecast at 7.29 MMT, slightly up from the revised MY2024/25 estimates. The wholesale market movement of branded items in mid-December is slower than in recent years mainly because of the slowing economic condition this year. Retail stores and online sales will continue to be the mainstream distribution channels.

Trade

Imports:

Post forecasts China’s orange imports for MY2025/26 to be 161,000 MT, flat from the previous year. In MY2024/25, China imported 160,880 MT of oranges from the world, nearly the same as the previous year. Top suppliers were South Africa, Australia, and Egypt. United States ranked as the fourth largest supplier, followed by Spain. While recent import demand has been flat, China has steadily decreased its imports by boosting domestic production.

Chart 2. China: Orange Imports by Marketing Year (November-October)

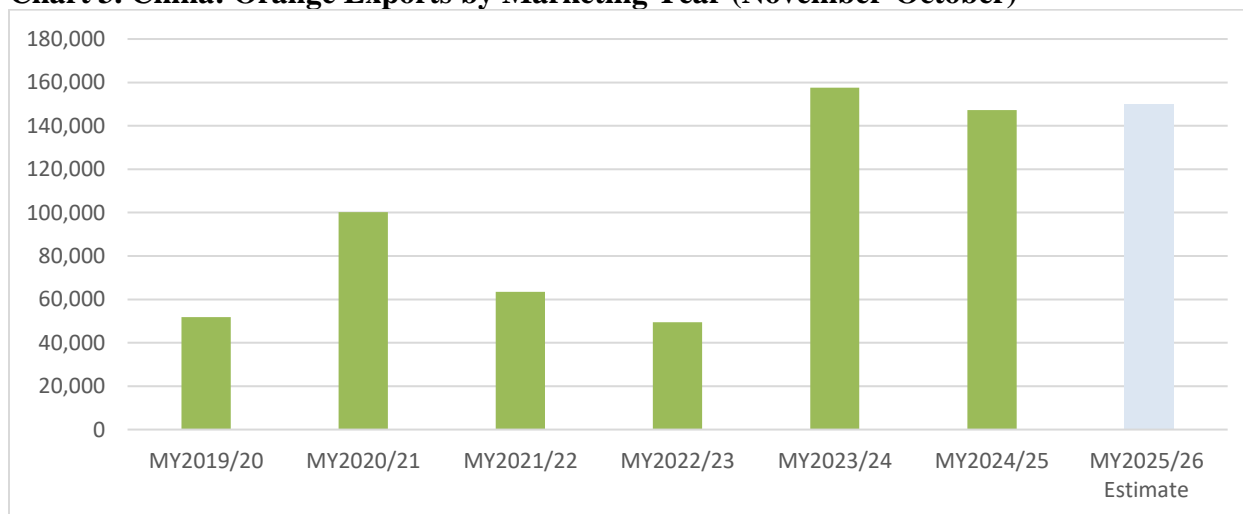


(Source: TDM; ATO Guangzhou; Unit: Metric Tons)

Exports:

MY2025/26 Orange exports are forecast at **150,000 MT**, slightly higher than the revised estimate for MY2024/25, driven by larger domestic supplies and improved fruit quality for shipments to neighboring markets such as Vietnam, Malaysia, the Philippines, Russia, and Thailand. Over the last three years China has maintained significantly higher exports than the average of the previous three years.

Chart 3. China: Orange Exports by Marketing Year (November-October)



(Source: TDM; ATO Guangzhou; Unit: Metric Tons. Country breakouts are not provided as no export destination accounted for more than 20% of total exports.)

ORANGE JUICE

Table 2. China: Production, Supply and Distribution for Orange Juice

Orange Juice Market Year Begins China	2023/2024		2024/2025		2025/2026	
	Oct 2023		Oct 2024		Oct 2025	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Deliv. To Processors (MT)	225000	225000	230500	400000	0	405000
Beginning Stocks (MT)	0	0	0	41800	0	27240
Production (MT)	17500	17500	17800	31000	0	31500
Imports (MT)	111248	111248	111000	49310	0	64100
Total Supply (MT)	128648	128648	128800	122110	0	122840
Exports (MT)	6400	6400	6400	11870	0	11500
Domestic Consumption (MT)	122348	80548	122400	83000	0	84400
Ending Stocks (MT)	0	41800	0	27240	0	26940
Total Distribution (MT)	128748	128748	128800	122110	0	122840

Unit: metric ton (MT)

In MY2024/25, Brazil's orange production fell to historic lows, sharply tightening global juice supplies. Faced with exceptionally high Brazilian concentrate prices, Chinese processors increased the volume of fresh oranges delivered for processing to sustain domestic demand. Industry sources anticipate that imports will regain some of the market lost in the prior year, but new domestic processing supply chains are now expected. As a consequence, Post's new estimates for 2024/25 are significantly revised from levels forecast in last year's report. As a note, all orange juice figures discussed are converted to 65-degree brix basis, frozen concentrated orange juice (FCOJ).

Production

Orange juice production for MY2025/26 is forecast at 31,500 MT, up slightly from the revised MY2024/25 estimates at 31,000MT. Since the last report, the 2024/25 estimate was revised up significantly from 17,800 to 31,000. This increase reflects both the higher volume of oranges delivered for processing and the entry of several new investors into the industry. In addition to *Nongfu Group's* well-established **17.5° not from concentrate (NFC) orange juice**, a new major player entered the market this year with the launch of its **“Chu”** brand NFC orange juice. The **“Chu”** brand, originating in Yunnan, was created years ago by a well-known local entrepreneur. The company initially focused exclusively on cultivating the premium **“Bingtang”** orange variety but has since expanded downstream into juice processing to capitalize on the growing demand for high-quality NFC products.

Prices

Industry sources anticipate that Brazilian FCOJ supplies will rebound in 2025/26, preventing a return to high prices seen in CY 2023 and 2024. Despite the sharp fall in international prices since the start of CY 2025, Chinese domestic retail prices for premium 100 percent orange juice and NFC juices are expected to remain stable. Several contacts reported that the price of FCOJ in China in MY2024/25 was relatively

lower than the Brazilian ingredients, which resulted in increasing demand from countries such as Australia, Netherlands, Ireland, Indonesia, Japan, Malaysia as well as neighboring areas such as Hong Kong and Taiwan.

Consumption

Post estimates China's MY2025/26 orange juice consumption at 88,400 metric tons, reflecting a slight increase from the revised MY2024/25 figure. MY2024/25 consumption was itself adjusted upward by three percent from the revised MY2023/24 estimate of 83,000 MT. Following consultations with industry sources, Post updated the MY2023/24 estimates to include previously unreported ending stocks.

Demand growth is driven largely by first- and second-tier cities, where younger consumers show a strong preference for premium juices promoted as healthy, especially fresh-squeezed orange juice. To meet rising demand for 100 percent orange juice and NFC products, domestic suppliers have broadened their range of offerings. The “*Chu*” brand expanded its NFC orange juice distribution to both online and offline channels, while other national brands like Nongfu Spring, Weiquan and Huiyuan continue to promote NFC and 100 percent orange juice portfolios across major retail platforms. Consumers in leading urban markets perceive these products as healthier, richer in natural nutrients (such as vitamin C), and convenient.

In recent years, Chinese processors have begun producing fresh 100 percent mandarin and pomelo juices, as well as NFC variants. These products, aimed at affluent consumers, require cold-chain distribution and have a relatively short shelf-life, often needing to be consumed within a few days, underscoring the premium and fresh-positioned nature of this emerging segment. It remains to be seen whether this trend will spread more widely in China and challenge demand for traditional orange juice.

Trade

Imports:

China's orange juice imports in MY2025/26 are forecast at 64,100 MT, an approximately 30 percent increase from the revised MY2024/25 imports of 49,310 MT. The rebound reflects a lower international price and industry contacts' belief that Brazilian production has improved sufficiently to provide supply availability. . The MY2024/25 import estimate was adjusted down 55 percent based on updated China Customs data. The substantial drop was mainly because FCOJ imports from Brazil were down 63 percent and from Israel down 23 percent. In recent years, several major Chinese juice processors have begun investing in domestic orange production to reduce reliance on imported concentrate.

Exports:

In MY2025/26, total orange juice exports are forecast at 11,500 MT, down about three percent from the revised MY2024/25 exports. The MY2024/25 estimate was adjusted up 85 percent to 11,870 MT to reflect updated China Customs data. Global import demand surged in the absence of traditional Brazilian exportable supplies. The top ten export destinations in MY2024/25 were Australia, Netherlands, Hong Kong, Taiwan, Ireland, Indonesia, Japan, Malaysia, Singapore, and Thailand.

TANGERINES & MANDARINS

Table 3. China: Production, Supply and Distribution for Tangerines & Mandarins

Tangerines/Mandarins, Fresh Market Year Begins China	2023/2024		2024/2025		2025/2026	
	Oct 2023		Oct 2024		Oct 2025	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	890050	890050	890080	890080	0	890100
Area Harvested (HECTARES)	0	0	0	0	0	0
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)	26900	26900	27000	27000	0	27100
Imports (1000 MT)	43	43	50	48	0	55
Total Supply (1000 MT)	26943	26943	27050	27048	0	27155
Exports (1000 MT)	1097	1097	1200	1215	0	1250
Fresh Dom. Consumption (1000 MT)	25235	25235	25315	25233	0	25255
For Processing (1000 MT)	580	580	600	600	0	650
Total Distribution (1000 MT)	26567	26567	27050	27048	0	27155

Unit: hectares (HA), metric ton (MT)

Production

For MY2025/26, China's production of tangerines and mandarins is forecast at 27.1 MMT, a slight increase from MY2024/25. Increasing production mainly reflects the larger supply in Guangxi, Yunnan, and other provinces which have experienced favorable weather conditions.

Price

On average, Post expects the orchard prices in MY2025/26 to be slightly lower than the previous year due to the larger supply. In mid-November, the average wholesale price for *Shatangjiu* is about RMB5(\$.69) per kilogram and the premium Guangxi *Shatangjiu*'s retail price could reach RMB36 (\$5) per kilogram, with the lowest price for low quality fruit RMB5 (\$0.83) per kilogram. With increasing supply and ordinary quality this year, the orchard prices of early variety of Wogan produced in Guangxi dropped about five percent, while the wholesale price for ordinary mandarins was listed as RMB1.2 (\$0.16) per kilogram in late November.

Consumption

Post forecasts for MY 2025/26 consumption for mandarin and tangerines at 25.26 MMT, up slightly from the revised Post estimate for MY 2024/25. Easy-to-peel mandarins and tangerines continue to be popular fruits, which are seen as both tasty and a way to increase daily intake of Vitamin C, which Chinese consumers see as important for strengthening the immune system. *Chinese Spring Festival* (normally in January or February) is one of the bestselling seasons for mandarins and tangerines. In 2026, the Chinese Spring Festival (Lunar New Year) will be relatively late from February 16 to March 3. This means a longer period for selling mandarin and tangerines. Chinese Spring Festival is one of the

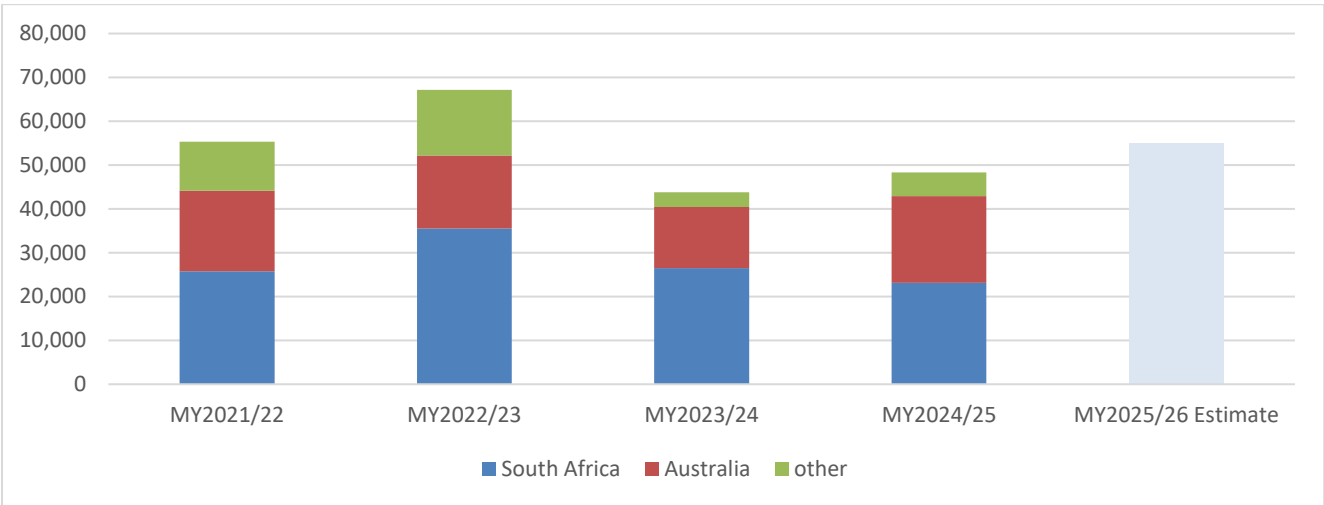
few times that families can gather from across China, leading to increased consumption of snacks and fresh fruit. Gift giving, whether within families, between friends, or in the workplace is common and citrus fruits are a popular gift option. In particular, giftboxes packed with premium mandarins/tangerines have gained attention on social media as a preferred Chinese Spring Festival gift.

Trade

Imports:

Post forecasts MY2025/2026 imports of mandarin and tangerines will reach 55,000 MT, up 14 percent from the previous year, assuming South Africa’s supply to China will likely rebound and the demand for Australian fruits will continue to be strong in the coming year.

Chart 4. China: Tangerine/Mandarin Imports by Marketing Year (October-September)

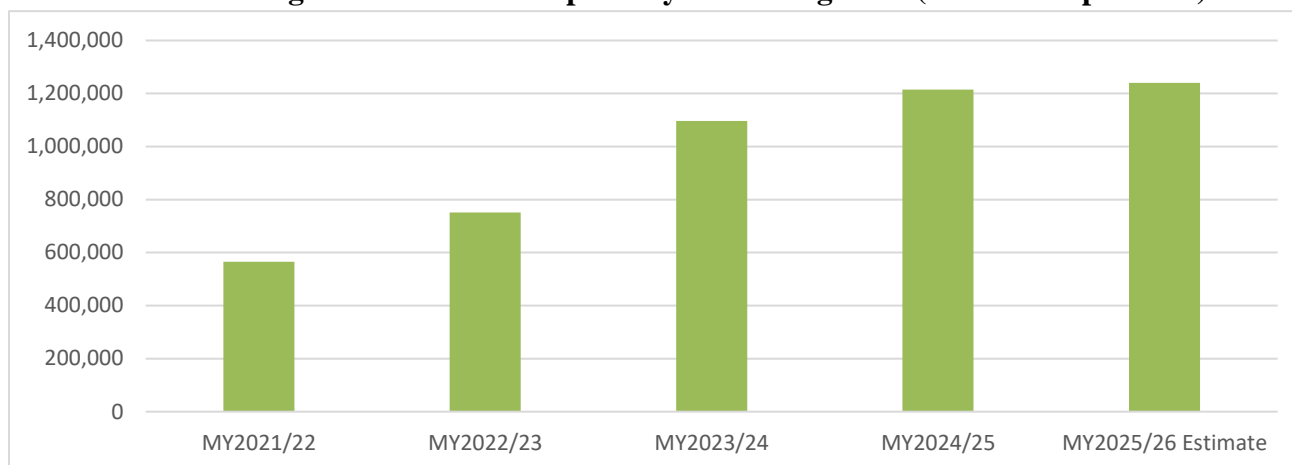


(Source: TDM; ATO Guangzhou; Unit: Metric Tons)

In MY2024/2025, China imported a total of 48,338 metric tons of mandarins (including tangerines and satsumas) from the world, up 10.4 percent from the previous year. The top three suppliers are South Africa (23,116 tons, down 12.66 percent), Australia (19,767 tons, up 41.8 percent), Peru (19,767 metric tons, up 41.8 percent). Other suppliers include Lao’s, United States (80 metric tons, down 23 percent), Morocco, Vietnam, Pakistan, Chile and Egypt etc.

Exports:

China’s exports of mandarins and tangerines in MY2025/26 are expected to reach 1.25 MMT, up two percent from the previous year. In MY2024/25, China exported a total of 1.215 MMT of mandarins/tangerines (up 10.8 percent from the previous year) to the world. Vietnam, Kyrgyzstan, Indonesia, Russia, Philippines, Thailand, Maylasia, North Korea, Bangladesh and Hong Kong are the top 10 export destinations.

Chart 5. China: Tangerine/Mandarin Exports by Marketing Year (October-September)

(Source: TDM; Unit: Metric Tons. Country breakouts are not provided as no export destination accounted for more than 20% of total exports.)

GRAPEFRUITS & POMELOS

Table 4. China: production, Supply and Distribution for Grapefruits & Pomeelos

Grapefruit, Fresh	2023/2024		2024/2025		2025/2026	
Market Year Begins China	Oct 2023		Oct 2024		Oct 2025	
	USDA Official	New Post	USDA Official	New Post	New Post	
Area Planted (HECTARES)	0	0	0	0	0	0
Area Harvested (HECTARES)	0	0	0	0	0	0
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)	5200	5200	5250	5235	0	5350
Imports (1000 MT)	89	89	90	107	0	115
Total Supply (1000 MT)	5289	5289	5340	5342	0	5415
Exports (1000 MT)	204	204	230	187	0	190
Fresh Dom. Consumption (1000 MT)	5039	5039	5050	5065	0	5130
For Processing (1000 MT)	46	46	60	90	0	95
Total Distribution (1000 MT)	5289	5289	5342	5342		5415

Unit: hectares (HA), Metric ton (MT)

Production



Various pomelos produced in China. (Source: ATO Guangzhou)

Total pomelo and grapefruit production in MY2025/26 is forecast at 5.35 MMT, up slightly from MY2024/25. In addition to Fujian and Guangdong, Guangxi and Jiangxi also grow large volumes of pomelos and hybrid grapefruit varieties. Increasing demand for high-quality pomelos and grapefruits is expected to drive farmers to adopt new varieties in some areas. “*Shatian*” pomelos are produced mostly in southern China such as Guangxi, Guangdong, and Fujian. Meizhou in Guangdong and Pinghe in Fujian are famous for their “*Golden*,” “*Honey*,” and “*Three red flesh*” varieties. Meanwhile, other varieties such as “*Wendan*” and “*Hong Baoshi*” are gaining ground. Jiangxi produces “*Hu*” and “*Majia*” varieties. Yunnan also started growing honey pomelos in its south-western areas in recent years. Grapefruit hybrids are mostly produced in southern and central region of China.

Prices

In MY2025/26, the orchard price of different varieties ranges from RMB 0.9 to RMB11 (\$0.12 - \$1.36) per kilogram. In early December, the orchard prices for Meizhou pomelos were RMB5 (\$0.69) per kilogram while the premium pomelo orchard price from Guangxi was about RMB 6 to RMB9 (\$0.83 - \$1.25) per kilogram. At the wholesale market, the ordinary pomelos are sold at RMB 4 – RMB 15 (\$0.55-\$2.08) per kilogram. In late November, Post observed retail prices for premium branded red flesh pomelos at around RMB 26 (\$3.6) per piece.

Consumption

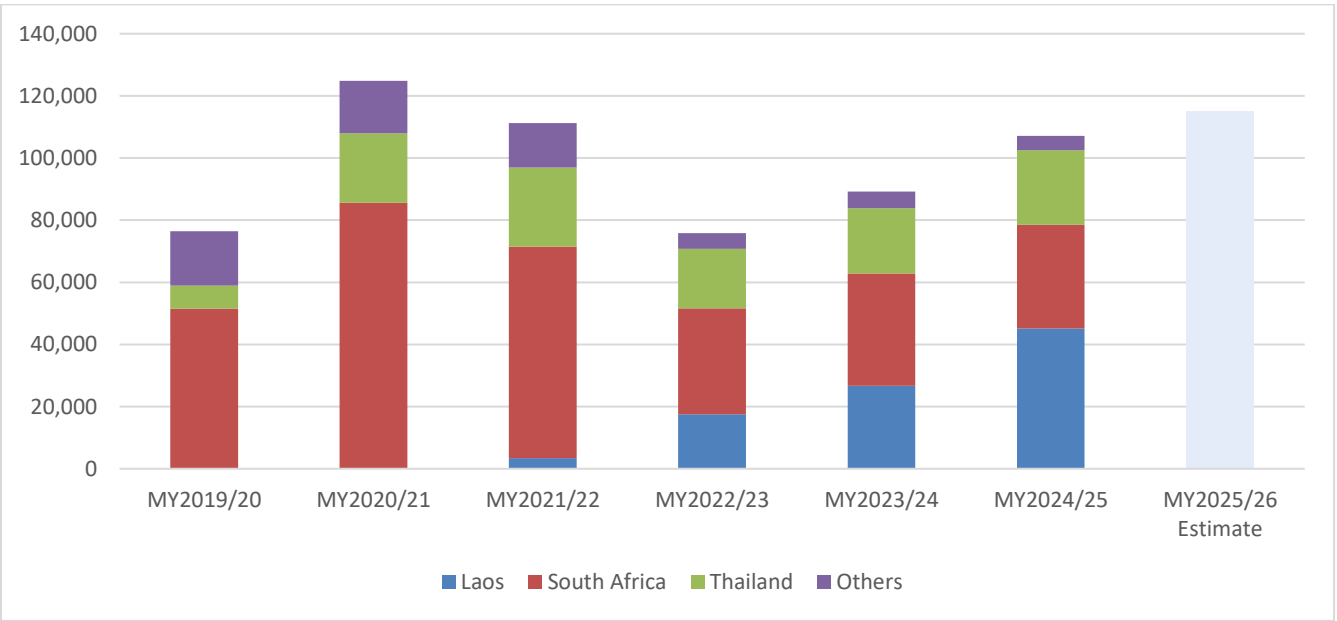
Consumption of grapefruit and pomelos in MY2025/26 is expected to reach 5.08MT, up slightly from the MY2024/25 estimate. Demand for premium pomelos and grapefruits will remain strong due to consumer perceptions of the fruit as being very rich in protein, Vitamin C, and other essential nutrients. In the Chinese market, consumers view pomelos as useful for lowering blood sugar levels and for weight control, they are also seen as beneficial to for skin care. Meanwhile, demand for pomelo/grapefruit-derived ingredients has grown rapidly, driven primarily by drink shops and other food processors.

Trade

Imports:

Grapefruit imports for MY2025/26 are forecast to reach 115,000 MT, up five percent from the revised MY2024/25 estimate. Based on end of marketing year trade data, MY 2024/25 pomelo imports were raised to 107,000MT up from 90,000 MT, a 20 percent increase from 2023/24. Imports have risen in response to growing supply from Laos driven by favorable seasonality and trade conditions, with the complementary nature of the two countries’ pomelo harvest seasons enabling Lao pomelos to fill supply gaps in the Chinese market. Additionally, benefiting from *China-ASEAN Free Trade* and *RCEP* frameworks, Lao pomelos enjoy price competitiveness in the market. These changes were reflected in the trade data where China’s imports from Laos grew 68.7 percent, reaching 45,116 MT and becoming the largest supplier. Laos was followed by South Africa (33,330 MT, down 7 percent) and Thailand (23,992 MT, up 14.4 percent). Other suppliers include Egypt, Taiwan, Morocco, Israel, and Peru.

Chart 5. China: Pomelos/Grapefruit Imports by Marketing Year (October – September)

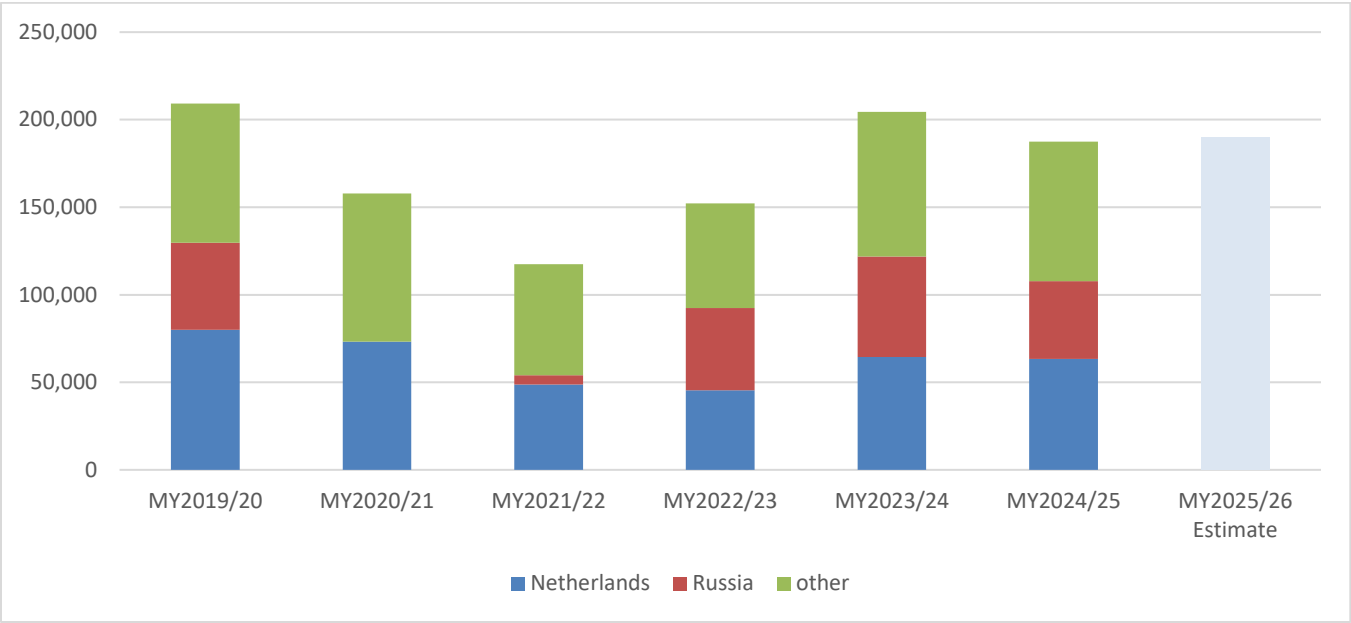


(Source: TDM; ATO Guangzhou; Unit: Metric Tons)

Exports

Post forecasts exports for MY2025/26 will be approximately 190,000 MT, up slightly from the previous year, due to a larger supply of better quality fruit more suitable for export. The Netherlands, Russia, Kyrgyzstan, Romania, and Ukraine are the top 5 export destinations. Post revised the MY2024/25 data to 187,396 MT based on updated trade data.

Chart 6. China: Pomelos/Grapefruit Exports by Marketing Year (October – September)



(Source: TDM; ATO Guangzhou; Unit: Metric Tons)

Attachments:

No Attachments