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Report Highlights:

Early seasonal conditions for the MY 2024/25 citrus crop have been very favorable. Along with expansion in production area, growers anticipate an improvement in production and the prospect of high-quality fruit production. Orange production is expected to increase five percent to 545,000 metric tons (MT) from the prior's year estimate, the highest over the last two decades. Tangerine/mandarin production is forecast to reach a record 225,000 MT. Orange exports are forecast to reach the third-highest output on record of 190,000 MT, and tangerine/mandarin exports are expected to reach a new record of 105,000 MT for MY 2024/25. Orange juice production is forecast to fall by two percent to 15,000 MT, mainly due to the anticipated improvement of fresh (navel) orange fruit quality. In contrast, imports are forecast to recover to 13,000 MT after falling from a lack of supply due to a severe drought impacting production in Brazil.

EXECUTIVE SUMMARY

Orange production in Australia is projected to increase to 545,000 metric tons (MT) in marketing year (MY) 2024/25, up from an estimated 520,000 MT in MY 2023/24. If realized, this situation would mark the highest production level in the past two decades. This growth is attributed to favorable early growing conditions for MY 2024/25 and an expansion in the production area. The lead-up to the fruit set benefited from relatively dry weather in key orange-producing regions, followed by above-average rainfall that supported robust fruit growth. Additionally, lower-than-usual winds minimized blemishes on the fruit. Overall, the early production outlook for the forecast year is highly positive in terms of both quantity and quality.

Citrus producers are also experiencing stable input costs, particularly for fertilizers and crop protection chemicals. Additionally, major irrigation water storages remain relatively high, ensuring ample water availability at reasonable prices comparable to those in MY 2023/24.

Orange exports are forecast to reach 190,000 MT, a 10,000 MT increase over the MY 2023/24 estimate, driven by higher production. If achieved, this would be Australia's third-largest export volume on record. Domestic consumption is also expected to rise to 170,000 MT in MY 2024/25, up from an estimated 150,000 MT for the previous marketing year. However, the volume of oranges allocated for processing is forecast to decline by almost three percent to 195,000 MT, reflecting improved fresh fruit quality. This marks a continued improvement from MY 2023/24, which benefited from drier conditions after several wetter-than-usual seasons that had previously compromised production and fruit quality.

Mandarin production continues to expand more rapidly than navel orange production, supported by a broader range of production regions and a focus on seedless varieties. Over the past decade, mandarin planted area has grown by 64 percent, with many new plantings expected to begin bearing fruit soon. Mandarin production is forecast to reach a record 225,000 MT in MY 2024/25, with exports also projected at a record 105,000 MT. Domestic consumption is anticipated to rise to a near-record 118,000 MT, driven largely by recent population growth.

Australia's orange juice production is expected to decline by two percent to 15,000 MT in MY 2024/25, mainly due to improved fresh orange crop quality, which reduces the volume of oranges allocated for processing. Meanwhile, orange juice imports are forecast to rise to 13,000 MT, up from 12,000 MT in MY 2023/24. The lower imports for MY 2023/24 are due to reduced supply from Brazil, typically by far the primary source for Australian orange juice imports, which has faced severe drought conditions. Orange juice exports are forecast to remain stable at 4,000 MT, while domestic consumption is projected to grow by two percent to 24,500 MT, largely driven by population growth.

FRESH ORANGES

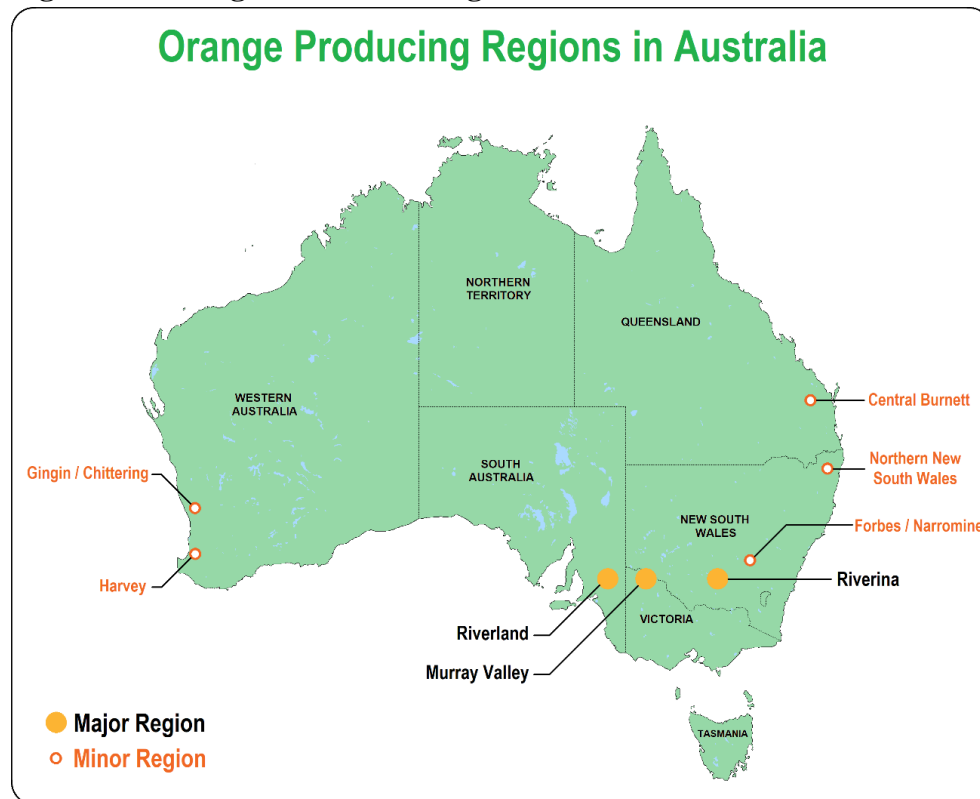
Industry Background

Regional Overview

The major orange production areas in Australia are in the southern temperate climate regions, with good availability and a reliable supply of irrigation water (see Figure 1). These regions are:

- **Riverina:** Situated in southern New South Wales 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

The key characteristics of these regions are that they are a temperate climate with free-draining sandy loam soil types and low annual rainfall of around 300 millimeters (mm), most of which falls between May and October during harvest and the early growth phases of the subsequent crop. Given mild winters there is an adequate cold chill period for the trees. These regions depend on irrigation to meet the tree water demands. These conditions support good bud bursts, offering high potential yield, and the low rainfall and warmer temperatures from spring to

autumn minimize the risk of frosts, humidity, and hail while optimizing growth rates with well-managed drip irrigation and fertilizer programs.

The total orange production area across these regions is 17,014 hectares (ha), accounting for 90 percent of the national production area. Nationally, navel oranges cover 12,625 ha, and Valencia oranges cover 6,379 ha, according to the Citrus Australia – Australian Citrus Tree Census 2023. The Riverina is the largest producer, with 53 percent of its total area planted with Valencia oranges, representing 66 percent of the national area dedicated to juicing oranges. Other smaller production areas exist in northern New South Wales, Queensland, and Western Australia.

Harvest Periods

The harvest period in the three major production regions for navel oranges is typically from June to October, and for Valencia oranges, it is usually from October to March. Some of the highest quality Valencia oranges are sold in the fresh market (rather than being juiced), extending consumers' domestic season of available fresh oranges.

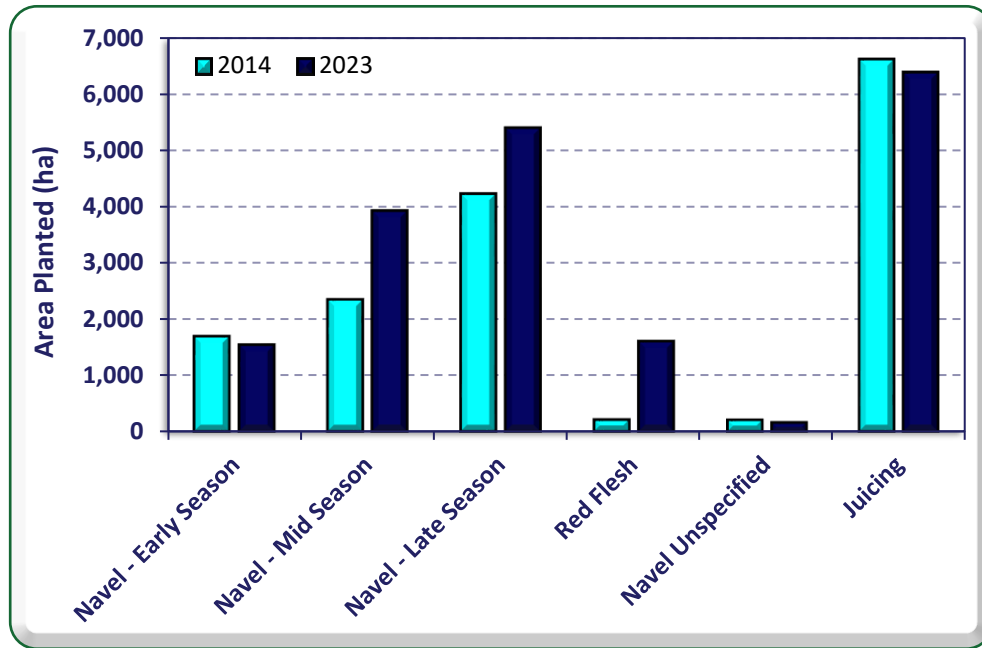
Trends in Planting Area

Citrus Australia's annual tree census, initiated in 2014, has revealed significant changes in planting trends. Between 2014 and 2023, there has been a notable increase in navel and red-flesh orange plantings across Australia's major producing regions. The transition of these trees from non-bearing to mature production is beginning to significantly impact overall production.

Around 87 percent of the non-juicing orange varieties are navel oranges; for this report, all non-juicing oranges are referred to as navel oranges. The majority of the juicing varieties (85 percent) are Valencia orange varieties, and for the purpose of this report, all juicing varieties are referred to as Valencia oranges.

The total planted area of navel and Valencia oranges increased by 24 percent, from 15,307 ha in 2014 to 19,004 ha in 2023. During this period, the Valencia orange area declined by four percent, while navel orange plantings increased by 45 percent. The largest growth in navel oranges occurred in mid-season varieties (up 67 percent, or 1,571 ha) and red-flesh varieties (up 655 percent, or 1,394 ha) (see Figure 2).

Figure 2 – Change in Orange Plantings 2014 to 2023



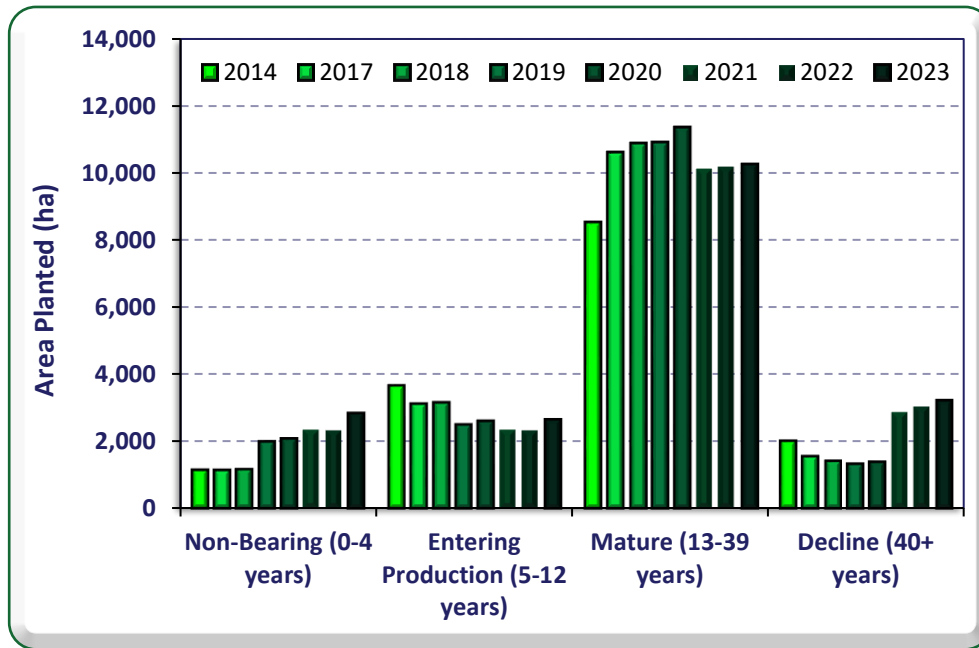
Source: Citrus Australia / Horticulture Innovation Australia

Future Outlook for Production

The long-term trend in orange production shows modest growth, driven by tree expansion. Several factors contribute to this outlook (see Figure 3):

1. **Increased Planting Rates:** Before 2019, new plantings averaged 1,200 hectares yearly. Since then, annual planting rates have exceeded 2,000 hectares and are approaching 3,000 hectares, leading to more trees entering production.
2. **Bearing Area Growth:** The total bearing area of orange trees increased by over 600 hectares (four percent) from 2022 to 2023, following years of flat growth. Similar expansion is expected in the coming years as the new plantings from 2019 continue to mature.
3. **Aging Trees:** A growing portion of the planted area consists of trees in their "Decline (40+ years)" phase, particularly among juicing varieties, which may temper overall production growth.

Figure 3 – Change in Orange Maturity Profile 2014 to 2023



Source: Citrus Australia / Horticulture Innovation Australia

Production

MY 2024/25

FAS/Canberra projects fresh orange production at 545,000 metric tons (MT) in marketing year (MY) 2024/25 (April 2025 to March 2026). This represents the highest production level in two decades and a five percent increase from the MY 2023/24 estimate of 520,000 MT. The growth is due to favorable early growing conditions and an expanded production area.

The period in the lead-up and during the fruit set has been typical, with relatively dry weather, which is favorable for citrus compared to recent years with wetter than usual conditions. After the fruit set phase, above-average rainfall in the main production regions has encouraging good fruit growth. The final fruit drop phase is expected to finalize in the coming weeks during December, and after this, a more accurate determination of the potential fresh orange production can be made. Additionally, growers report that there were no heavy winds, which often occur around September, so there is little limb rub impacting fruit skin quality for the forecast crop. However, there are reports of frost damage to some orchards in September 2024 that have had some negative impact. Overall, the conditions so far have placed the forecast crop toward very good yields and quality for MY 2024/25.

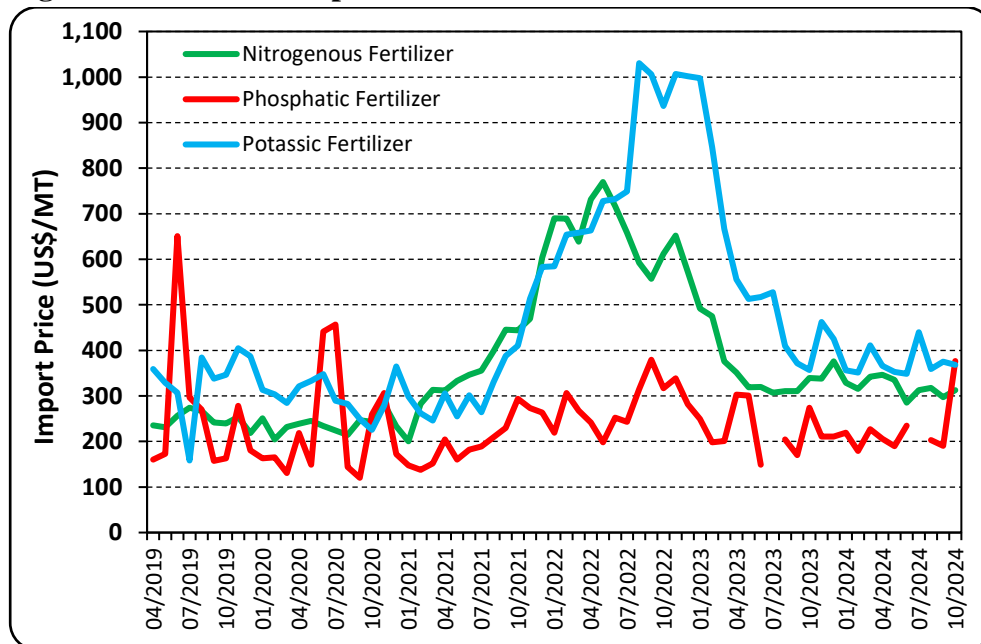
Additionally, the new plantings from 2019 are beginning to mature, contributing to increased production. Citrus Australia’s census data shows a four percent increase in the area of orange trees bearing fruit from 2022 to 2023, with further growth expected in 2024. Notably, the area dedicated to juicing oranges has remained static over the past five years, meaning the increase in bearing trees is primarily for navel oranges targeting the fresh market.

Along with a good early start to the production conditions, key input costs of fertilizer and chemicals are relatively stable and generally at or a little above pre-COVID-19 impacted levels. There is also ample irrigation water supply available, and industry sources indicate that this is keeping irrigation water costs at manageable levels. These overall circumstances are expected to encourage growers to optimize their orange crops to improve the volume of higher-value sales for MY 2024/25.

Fertilizer Price Stabilize

Australia relies heavily on imported fertilizers, and changes to import prices are a key indicator of shifts in farmgate costs. Since late 2023, fertilizer prices have stabilized slightly above pre-COVID-19 prices (see Figure 4). These levels are far more manageable than the sharp increases seen in 2022 and 2023 due to energy-driven cost spikes and supply chain disruptions. Phosphatic fertilizers have remained relatively stable over the past five years. No foreseeable disruptions are expected to cause drastic price increases, keeping fertilizer costs manageable for citrus growers in 2025.

Figure 4 – Fertilizer Import Price Trend

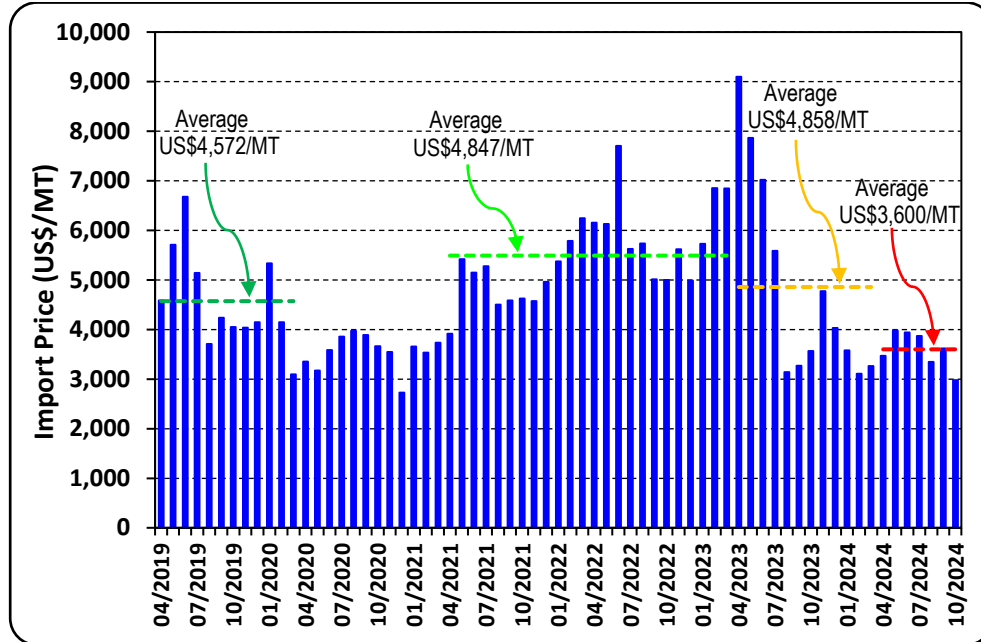


Source: Australian Bureau of Statistics

Crop Protection Chemicals back to pre-COVID-19 Prices

Like fertilizer, many Australian citrus growers import crop protection chemicals. Prices for crop protection chemicals, like for nitrogenous and phosphatic fertilizers, have followed a similar pattern over the last five years. Prices have been relatively stable since the end of 2023 at below pre-COVID-19 impacted levels (see Figure 5). Stable prices and costs support growers in optimizing crop protection measures, ensuring the best possible fruit quality for MY 2024/25.

Figure 5 – 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)

Ample Irrigation Water in Storage

The major water storages influencing the key orange-producing regions were all at relatively high levels at the end of November 2024, well into the start of the 2024/25 irrigation season. Above-average rains towards the end of November and early December 2024 have temporarily eased the broader demand for irrigation water. Tradeable temporary irrigation water prices so far for the 2024/25 season impacting the MY 2024/25 fresh orange crop are similar to or slightly below the same period in the previous year. Industry sources indicate that the current temporary water prices are economically viable and do not impede production of the MY 2024/25 fresh orange crop.

Energy Costs Remain Elevated

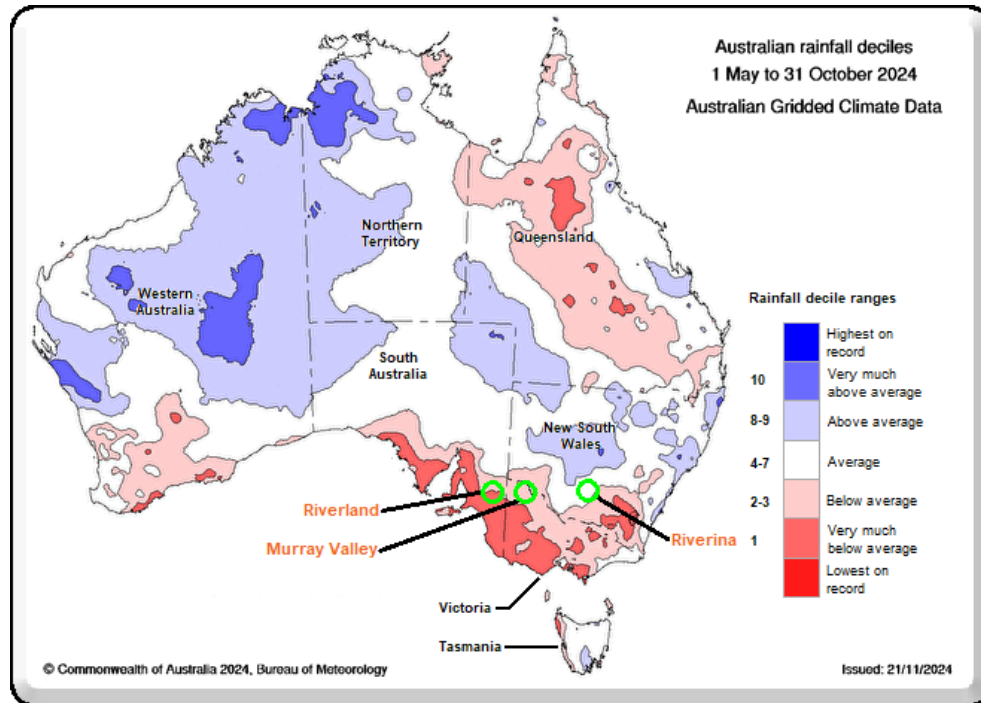
Energy costs, particularly for irrigation, remain significant due to Australia's high electricity prices. Relatively high electricity costs by world standards are now entrenched in the Australian economy despite Australia being an energy resource-rich nation with large reserves of thermal coal, gas, and uranium and the world's number one solar energy producer per capita. A key determinant is that in Australia, around one-third of the consumer price of electricity is the cost of energy, and two-thirds is the cost of delivery and administration. Continued capital expenditure on electricity grid interconnection for renewable energy integration suggests that electricity prices are unlikely to decrease in the near term. This may result in increasing citrus growers opting to manage their electricity price and reliability risk by establishing their own on-farm renewable energy production and storage systems.

MY 2023/24

The FAS/Canberra orange production estimate for MY 2023/24 of 520,000 MT is downward revised by 10,000 MT from the forecast set 12 months prior. Production for this year is estimated to be marginally above the prior MY 2022/23 production of 515,000 MT. Some growers have indicated that there has been a cumulative impact of above-average seasonal rainfall in prior years that has negatively impacted orange trees and resulted in lower production than expected for MY 2023/24.

During the MY 2023/24 harvest period (May 2024 to October 2024), the major orange-producing regions had average to below-average rainfall (see Figure 6). This supported fruit quality by reducing disease pressure. With ample irrigation water, growers could help the crop optimize quality in the lead-up to harvest. Growers indicate that the drier conditions during this period, similar to typical seasonal expectations, have supported orange trees towards and improved start to the MY 2024/25 production season.

Figure 6 – Rainfall Deciles – May to October 2024



Source: Bureau of Meteorology

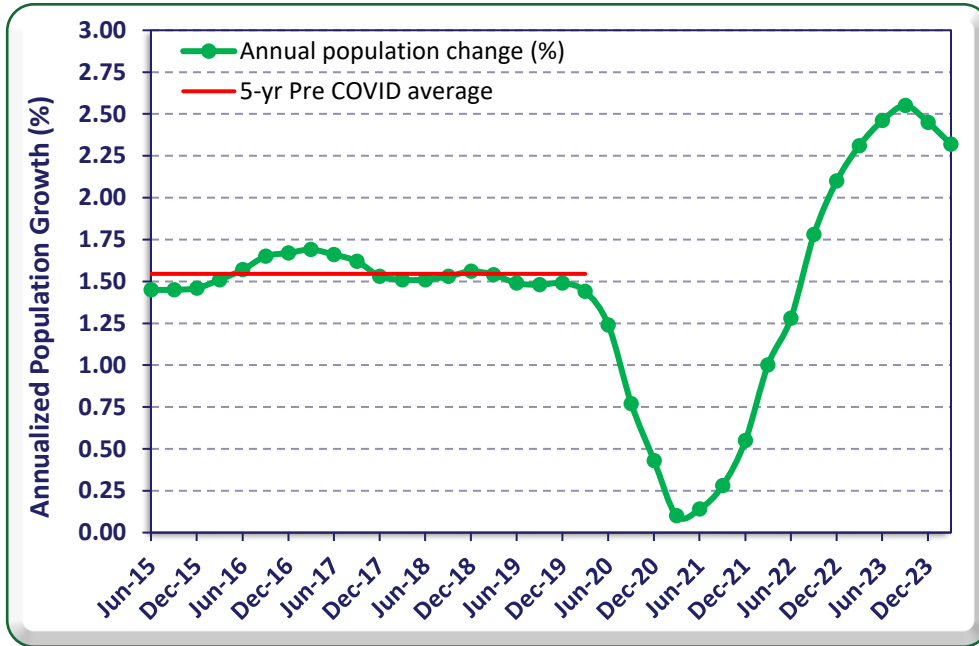
Consumption

MY 2024/25

FAS/Canberra forecasts domestic consumption of fresh oranges in MY 2024/25 to rise to 170,000 MT, up from an estimated 150,000 MT in MY 2023/24. This anticipated increase is due to larger production volumes and overall higher fruit quality, which are expected to reduce the share of navel oranges diverted to juice processing. With a return to typical fruit quality, domestic demand is projected to exceed historical averages. Additionally, Australia's rising population is likely to bolster fresh orange consumption during the forecast year.

Australia's population growth rate has surged beyond the steady pre-COVID-19 rate of just over 1.5 percent per annum. From late 2022, the growth rate has consistently exceeded the pre-pandemic average, reaching an annualized rate of approximately 2.3 percent by the first quarter of 2024 (see Figure 7). The majority of this growth is due to high immigration, although the federal government has since implemented measures to slow the immigration rate. However, the strong growth through 2024 will continue positively influencing fresh orange consumption well into 2025.

Figure 7 – Australian Population Growth Trend



Source: Australian Bureau of Statistics

Consumption for processing is forecast to decline to 195,000 MT in MY 2024/25 from an estimated 200,000 MT in MY 2023/24. This expected decrease is tied to an anticipated further improvement in the quality of fresh oranges harvested, aligning with typical quality expectations. As a result, fewer rejected navel oranges will likely be redirected to juice production during the packing process compared to MY 2023/24.

MY 2023/24

FAS/Canberra estimates domestic orange consumption for MY 2023/24 at 150,000 MT, which is 12,000 MT lower than the prior MY 2022/23. This variance is mainly due to a slight change in the estimated production but a significant improvement in the overall quality of fresh oranges. The improved quality spurred higher export sales, reducing availability for domestic consumption.

Trade
Exports

MY 2024/25

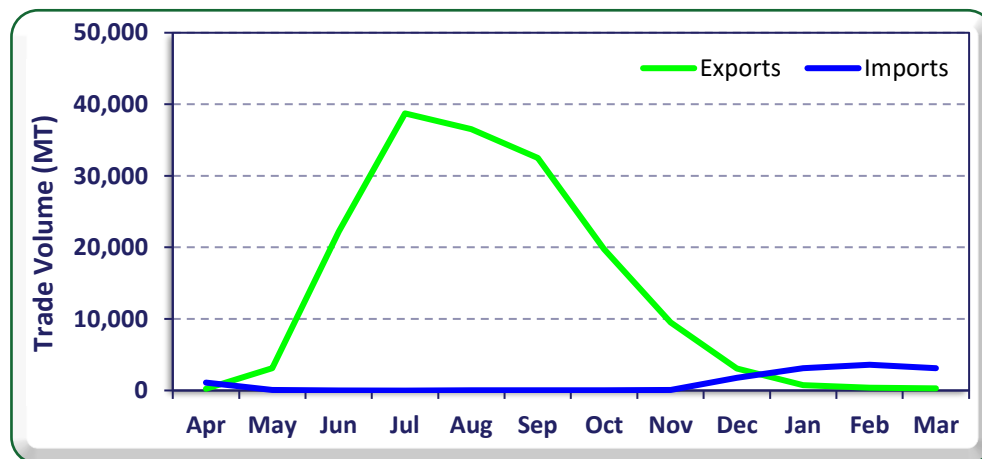
FAS/Canberra forecasts fresh orange exports to reach 190,000 MT in MY 2024/25, representing a 10,000-MT increase over the MY 2023/24 estimate. This would mark a return to recent historical levels, ranging from 181,000 MT to 198,000 MT, achieved between MY 2016/17 and MY 2019/20. During that period, seasonal conditions were more favorable compared to the

wetter-than-usual years, which subsequently affected production volumes and quality. If realized, this forecast would represent the third-highest export volume on record. The anticipated increase supports expectations of higher production and the return of high-quality fruit, which typically boosts export suitability.

Exports are largely influenced by production and quality. In seasons with high overall quality, is a larger proportion of fresh oranges are suited for the export market, and fewer lower-grade oranges are diverted for juicing.

Fresh orange exports from Australia are highly seasonal. Small volumes are shipped in May from northern production regions, but significant export activity begins in June with the harvest from the three major producing regions (see Figure 8). Peak export months are July through September, tapering off gradually until December. This harvest timing enables Australia to supply navel oranges to low-producing nearby Asian markets and counter-seasonal northern hemisphere countries.

Figure 8 – Seasonality of Australian Fresh Orange Trade



Source: Australian Bureau of Statistics

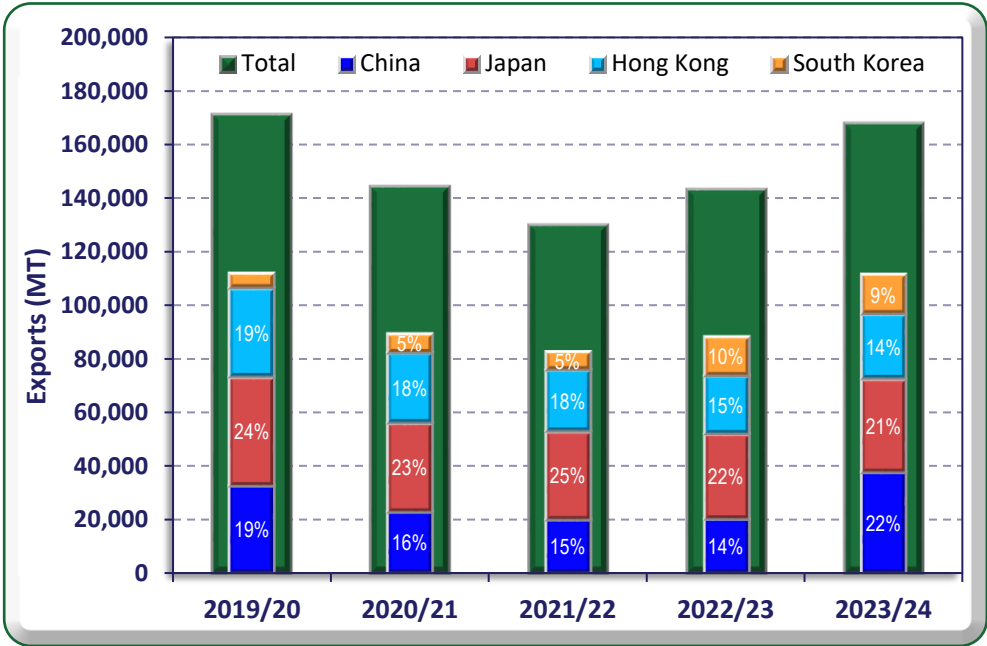
MY 2023/24

FAS/Canberra's export estimate for MY 2023/24 remains unchanged at 180,000 MT, consistent with the forecast issued 12 months prior. From April to October of MY 2023/24, exports totaled 168,000 MT. Given that, historically, the last five months of the marketing year account for an average of eight percent of annual exports, this trend supports the current estimate.

Over recent years, the primary export destinations for Australian oranges have been Japan, China, and Hong Kong, with South Korea emerging as a significant market in MY 2022/23. These four countries typically account for more than 60 percent of total exports (see Figure 9). Overall, Australian oranges are exported to over 40 countries, with most of them to key Asian markets.

Exports to China surged in MY 2023/24, making up 22 percent of total exports and reclaiming its position as Australia’s largest export destination—a status it held for five consecutive years before MY 2019/20. Industry sources note that China favors high-quality, large-sized oranges. MY 2023/24 marked the first high-quality harvest since MY 2019/20, after three years of above-average rainfall that negatively impacted fruit quality and production. With further fruit size and quality improvements anticipated for MY 2024/25, there is potential for even greater 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.

Figure 9 – Major Orange Exports – Apr-Oct MY 2019/20 to 2023/24



Source: Australian Bureau of Statistics

TRADE ACCESS

United Kingdom – Australia Free Trade Agreement

The United Kingdom (UK) and Australia free trade agreement (FTA) came into force on May 31, 2023. As part of this agreement, Australia received tariff-free access for citrus fruits to the United Kingdom (UK). Australia's citrus trade with the UK has mainly been very small volumes of mandarins, and due to the sea freight distance between the two nations, it is not anticipated that the elimination of tariffs will have a significant impact on the citrus trade from Australia to the UK. So far, since the FTA came into force, there has been no change in citrus trade from Australia to the UK.

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 advanced, but a commitment or timeline has yet to be established to finalize in favor or against the request.

Over the last five years, Australia has exported from 1,300 MT to 5,200 MT of oranges and 1,200 MT to 4,800 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 UK. The regions that currently do not have access to the U.S. market mainly produce mandarins, so it is likely that if access were granted that there would be an increase in mandarin exports and little change to orange exports.

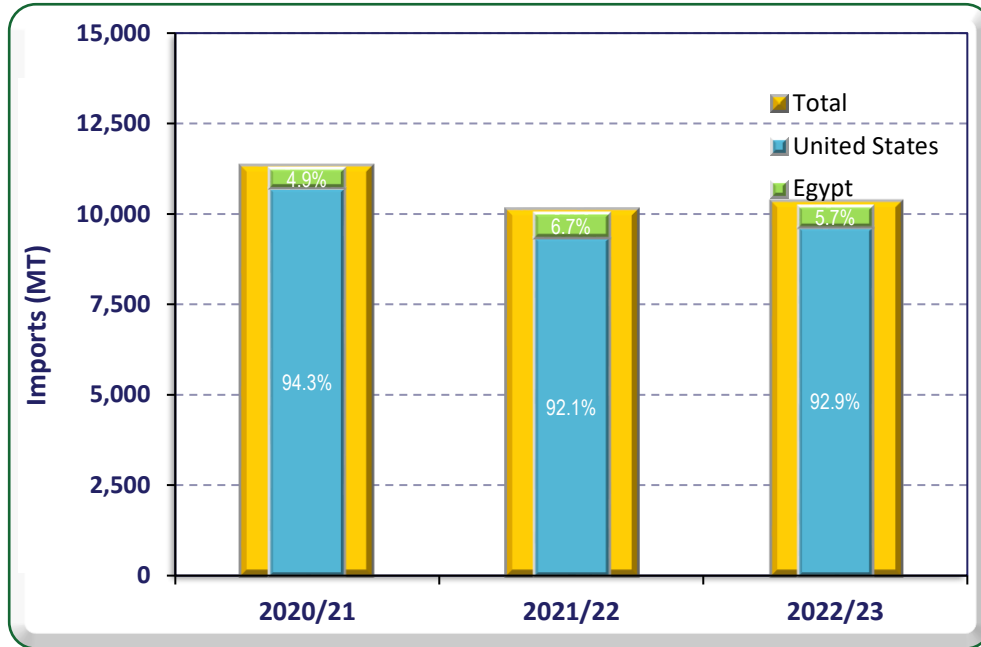
Imports

FAS/Canberra forecasts orange imports to remain stable at 10,000 MT in MY 2024/25, consistent with the MY 2023/24 estimate. This level aligns with the trend observed over the past three marketing years. However, in the years preceding the pandemic, orange imports ranged from 14,000 to 16,000 MT. Despite Australia's growing population and the resolution of pandemic-related logistics and high shipping costs, there are no indications that orange imports will return to pre-pandemic levels in the near term.

Orange imports from northern hemisphere countries are counter-seasonal to domestic production, typically between December and April. Nearly all imported navel oranges originate from the United States, with Egypt contributing the remaining six to eight percent (see Figure 10). California, the primary orange-producing region in the United States, is expected to see a modest improvement in production for the 2024/25 harvest due to favorable growing conditions.

This is anticipated to ensure an adequate supply of oranges for Australia’s estimated imports during the current MY 2023/24.

Figure 10 – Major Fresh Orange Imports to Australia MY 2020/21 to 2022/23



Source: Australian Bureau of Statistics

Table 1 - Production, Supply, and Distribution of Fresh Oranges

Oranges, Fresh Market Year Begins Australia	2022/2023		2023/2024		2024/2025	
	Apr 2023		Apr 2024		Apr 2025	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	17800	17800	17900	19000	0	19500
Area Harvested (HECTARES)	15400	15500	15500	16200	0	16600
Production (1000 MT)	505	515	530	520	0	545
Imports (1000 MT)	10	10	10	10	0	10
Total Supply (1000 MT)	515	525	540	530	0	555
Exports (1000 MT)	160	153	180	180	0	190
Fresh Dom. Consumption (1000 MT)	145	162	160	150	0	170
For Processing (1000 MT)	210	210	200	200	0	195
Total Distribution (1000 MT)	515	525	540	530	0	555
(HECTARES) ,(1000 TREES) ,(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

ORANGE JUICE

Production

FAS/Canberra forecasts orange juice production in MY 2024/25 at 15,000 MT, representing a two percent decrease from the MY 2023/24 estimate of 15,300 MT. This reduction is primarily attributed to the expectation of improved fresh orange quality during the MY 2024/25 season, resulting in fewer rejected fruits being directed to juicing. Additionally, assuming typical seasonal conditions, stable input costs (as discussed for fresh oranges), and no significant changes to the Valencia orange production area, Valencia production levels are expected to remain steady in the forecast year.

The production potential of Valencia oranges, which are primarily used for juicing, is projected to remain relatively stable in the short term. Valencia orange varieties currently account for 34 percent of the total orange planted area, with a modest four percent decline in planted area from 2014 to 2023 (see Figure 2).

The slight reduction in Valencia orange planting has been offset by an increase in navel orange production, leading to incremental growth in rejected navel oranges being diverted to juice production in recent years. However, the industry anticipates that as older Valencia trees (40+ years) become less productive and economically unviable, they will be removed. This is expected to accelerate the decline in the total Valencia production area more rapidly than in previous years.

Consumption

MY 2024/25

FAS/Canberra forecasts domestic orange juice consumption for MY 2024/25 at 24,000 MT, a slight increase from the 23,500 MT estimated for MY 2023/24. This figure aligns with recent consumption trends but remains significantly lower—around 8,000 MT—than levels observed in MY 2019/20 and earlier. There has been a substantial shift over recent years with lower imports and higher exports, contributing to substantially lower domestic consumption results.

MY 2023/24

The MY 2023/24 orange juice consumption estimate of 23,500 MT reflects a 2,000 MT downward revision from the forecast made 12 months prior. Given Australia imports approximately half of its orange juice supply, variations in imports have a greater impact on domestic consumption than fluctuations in domestic production. Historically, imports for the first four months of a marketing year (July to October) account for roughly one-third of total annual imports. For this period in MY 2023/24, imports reached only 3,970 MT, prompting a downward revision of both the import estimate and the corresponding domestic consumption figure.

In recent years, a growing consumer focus on health has shifted preferences toward higher-value fresh orange juice and away from lower-value reconstituted juice. This trend has resulted in a sharper decline in reconstituted orange juice consumption than the corresponding rise in fresh orange juice demand.

Trade

Exports

MY 2024/25

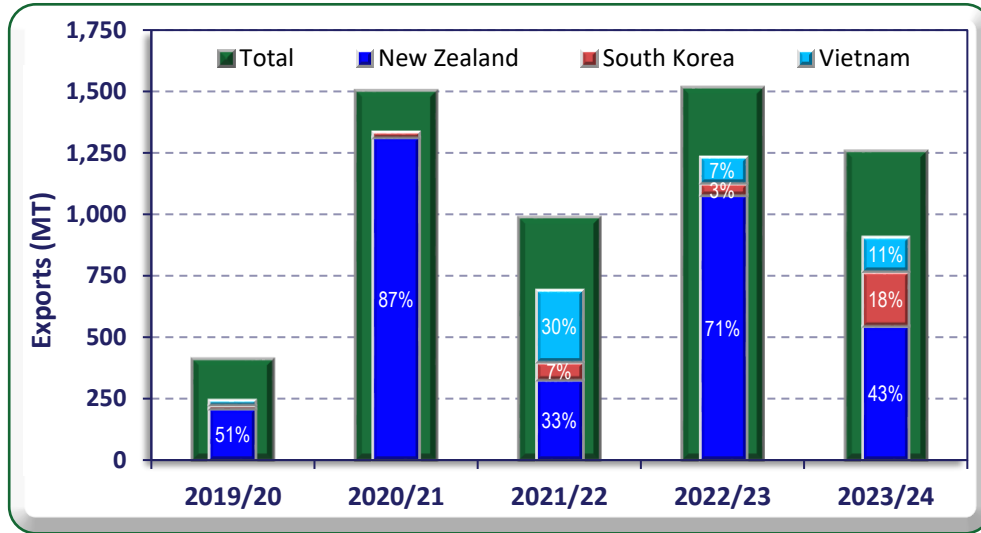
FAS/Canberra forecasts orange juice exports for MY 2024/25 to remain steady at 4,000 MT, matching the MY 2023/24 estimate. This volume is consistent with recent years and represents approximately a quarter of overall production. Over the past decade, annual orange juice exports have fluctuated between 1,500 MT and 5,600 MT, averaging 3,500 MT.

MY 2023/24

The FAS/Canberra's MY 2023/24 orange juice export estimate of 4,000 MT is 1,000 MT above the MY 2022/23 outcome. For the first four months of the marketing year, exports are at around 1,250 MT for a period in which, over the last five years, averaged around 32 percent of the annual export volume. Based on this seasonality, if it holds for the remainder of the year, the results are on track to reach to 4,000 MT estimate.

New Zealand has long been Australia's primary destination for orange juice exports; however, the volume and proportion of exports to New Zealand have varied significantly over the past five years (see Figure 11). Preliminary data for MY 2023/24 suggests a notable decline in exports to New Zealand, offset by substantial increases in shipments to Vietnam, particularly South Korea. This shift is due to severe drought conditions in Brazil, which have significantly impacted global orange production. As a result, importers are increasingly turning to alternative suppliers, including Australia.

Figure 11 – Major Orange Juice Exports – Jul to Oct MY 2019/20 to 2023/24



Source: Australian Bureau of Statistics

Imports

MY 2024/25

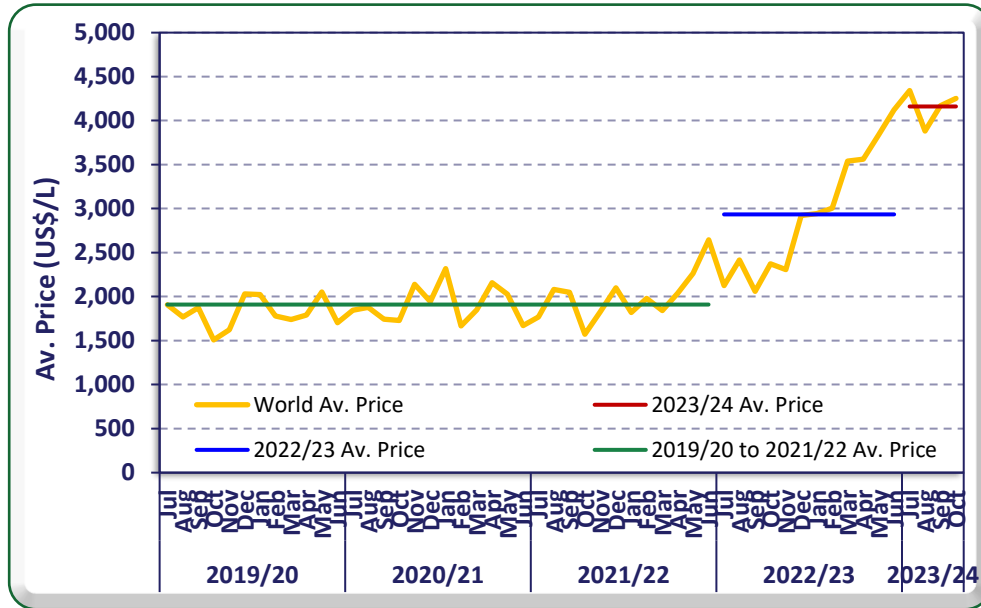
FAS/Canberra forecasts orange juice imports for MY 2024/25 at 13,000 MT, an increase of 1,000 MT compared to the MY 2023/24 estimate. A significant drop in imports occurred in MY 2022/23 (April 2023 to March 2024), with total imports falling to 9,800 MT due to a severe drought in Brazil that disrupted supply. Imports are expected to rebound substantially in MY 2023/24 as Australian importers diversify their sourcing. Further recovery is anticipated for MY 2024/25, assuming partial recovery of Brazil’s orange production.

MY 2023/24

The MY 2023/24 orange juice import estimate of 12,000 MT represents a 2,200 MT increase over the MY 2022/23 outcome. Between July and October 2024, 3,970 MT of orange juice was imported. Historically, this period accounts for approximately one-third of the full marketing year’s imports. This trend indicates that the import target for MY 2023/24 is on track.

Australia imports nearly as much orange juice as it produces, with imports making up around half of domestic consumption. Consequently, domestic market prices are significantly influenced by global market prices. Orange juice import prices, which had been stable for several years, began to escalate at the start of MY 2022/23. While prices have stabilized during the first four months of MY 2023/24, they remain more than double their previous levels (see Figure 12).

Figure 12 – Orange Juice Import Price Trend - MY 2019/20 to MY 2023/24 (Jul-Oct)

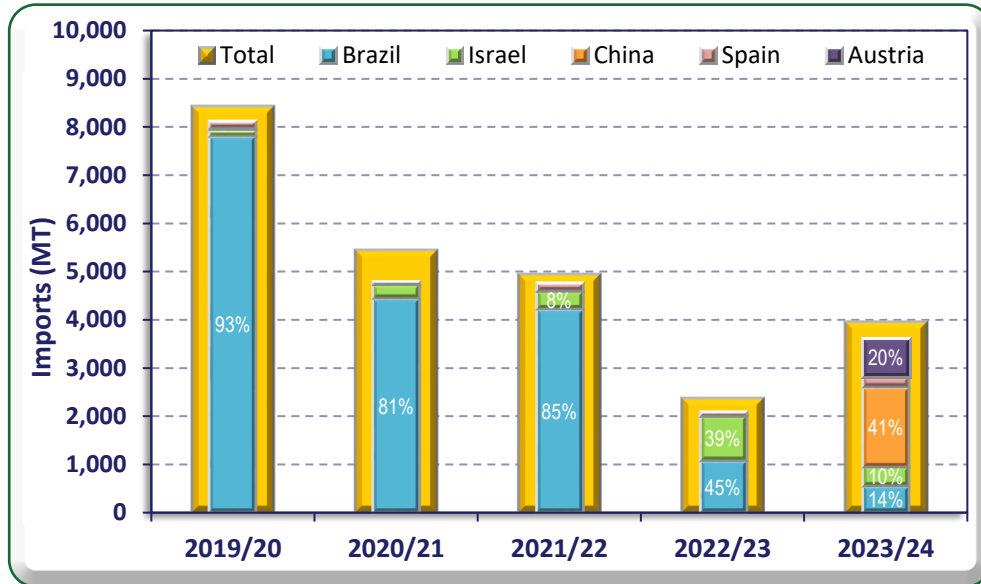


Source: Australian Bureau of Statistics

The primary driver of rising global orange juice prices is the severe drought in Brazil, which has significantly reduced irrigation water availability and impacted orange production. Additional contributing factors include the effects of citrus greening and citrus canker diseases in Florida, the second-largest orange-producing region in the United States.

Brazil has long been the dominant supplier of orange juice to Australia, typically accounting for over 80 percent of imports in recent years (see Figure 13). However, the drought in Brazil significantly disrupted supply in MY 2022/23, leading to a sharp decline in imports from Brazil. Australian importers initially responded by increasing imports from Israel, though this only partially offset the shortfall. By the first four months of MY 2023/24, imports from China and Austria—a new supplier—had increased, signaling a more robust diversification of sources.

Figure 13 – Australian Orange Juice Imports – Jul to Oct MY 2019/20 to MY 2023/24



Source: Australian Bureau of Statistics

Table 2 - Production, Supply, and Distribution of Orange Juice

Orange Juice Market Year Begins	2022/2023		2023/2024		2024/2025	
	Jul 2023		Jul 2024		Jul 2025	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Australia						
Deliv. To Processors (MT)	210000	210000	200000	200000	0	195
Beginning Stocks (MT)	976	976	1076	876	0	676
Production (MT)	16100	16100	15400	15300	0	15000
Imports (MT)	14000	9800	14000	12000	0	13000
Total Supply (MT)	31076	26876	30476	28176	0	28676
Exports (MT)	5000	3000	4000	4000	0	4000
Domestic Consumption (MT)	25000	23000	25500	23500	0	24000
Ending Stocks (MT)	1076	876	976	676	0	676
Total Distribution (MT)	31076	26876	30476	28176	0	28676

(MT)

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FRESH TANGARINES/MANDARINS

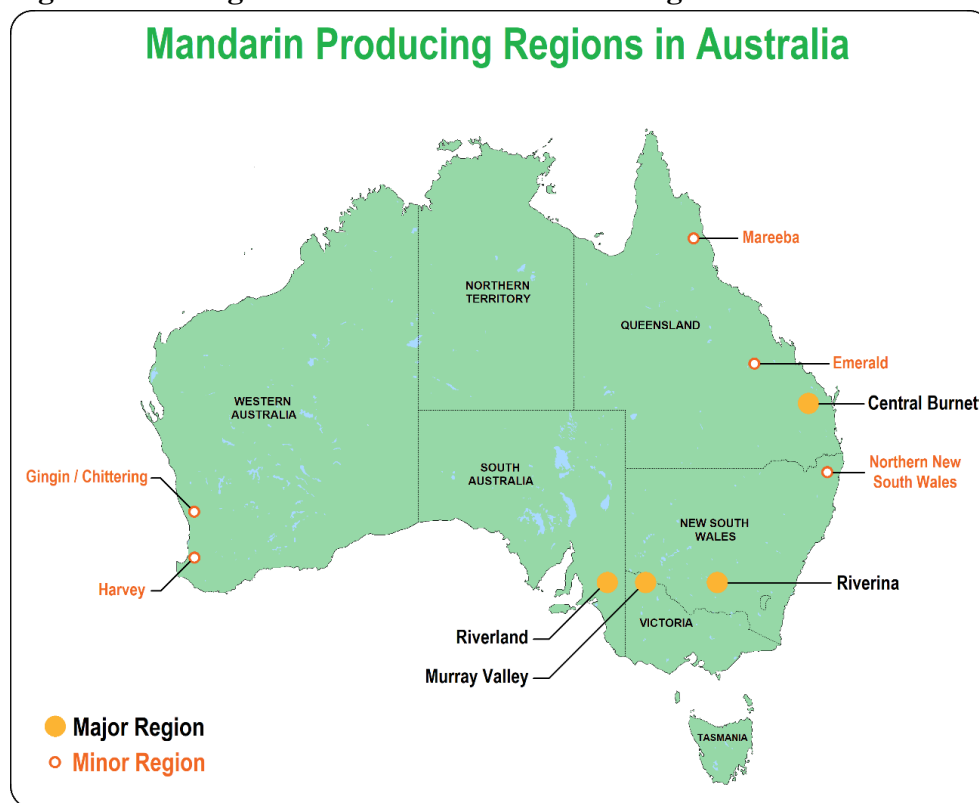
Industry Background

Australia’s mandarin and tangerine production regions are far more diverse than the three major orange-producing regions. While there are tangerines produced in Australia, the overall area is very small, so almost all production is mandarin varieties, with Afourer, Imperial, and Murcott’s (and their respective derivatives) being 77 percent of the overall area (Source: Citrus Australia – Australian Citrus Tree Census 2023).

The main harvest period for mandarins in Australia is from May to September. However, the production regions are diverse, and the harvest period of mandarins stretches from March to October.

Queensland, by far, has the largest area of mandarin production in Australia at 4,635 ha, accounting for 52 percent of the national production (see Figure 14). The next largest regions are the Murray Valley in Victoria, with 1,598 ha (18 percent), and Riverland in South Australia, with 1,392 ha (16 percent). The largest mandarin-producing area in Queensland is in the Central Burnett area in the southeast of the state around Gayndah and Mundubbera, but they are also produced in Emerald (Central Queensland) and Mareeba (Far North Queensland). Other small mandarin-producing areas are in northern New South Wales, Northern Territory, and Western Australia.

Figure 14 – Tangerine/Mandarin Production Regions in Australia

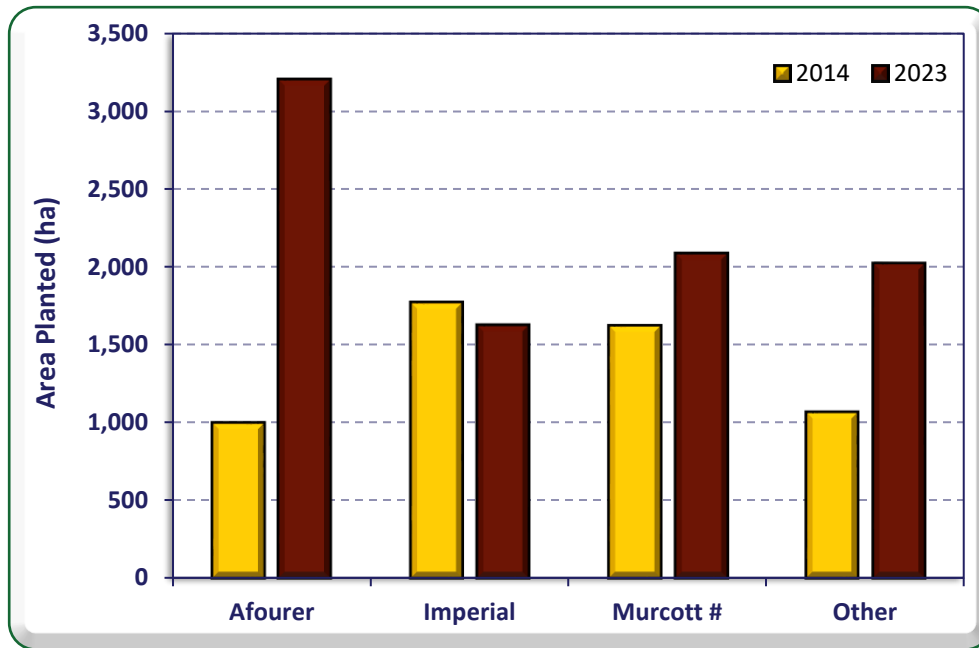


Source: Citrus Australia / Australian Bureau of Statistics Census / FAS/Canberra

Over the period from 2014 to 2023, since tree census data has been collected, there has been a 64-percent increase in mandarin plantings from 5,451 ha to 8,948 ha. This is a much larger growth rate and total area growth than oranges over the same period. Also, this growth has broadly occurred across all producing regions in Australia.

The Afourer (including Amorette and Tango) variety has by far had the largest growth in production area over the 2014 to 2023 period, from 998 ha to 3,202 ha, and is now clearly the dominant variety (see Figure 15). The area of Murcott (includes low-seeded Honey Bee and Royal Honey) has also increased by 29 percent over the same period, while the older variety Imperial (includes Goldup and Avana) has declined by eight percent. In the ‘other’ category, including tangelos, there are 29 varieties, the total planted area of which has grown by 90 percent (959 ha). The varieties in this ‘other’ category with the greatest increase in the planted area are all relatively new low-seed or seedless varieties, Daisy, Phoenix, and Tango.

Figure 15 – Change in Mandarin Plantings 2014 to 2023

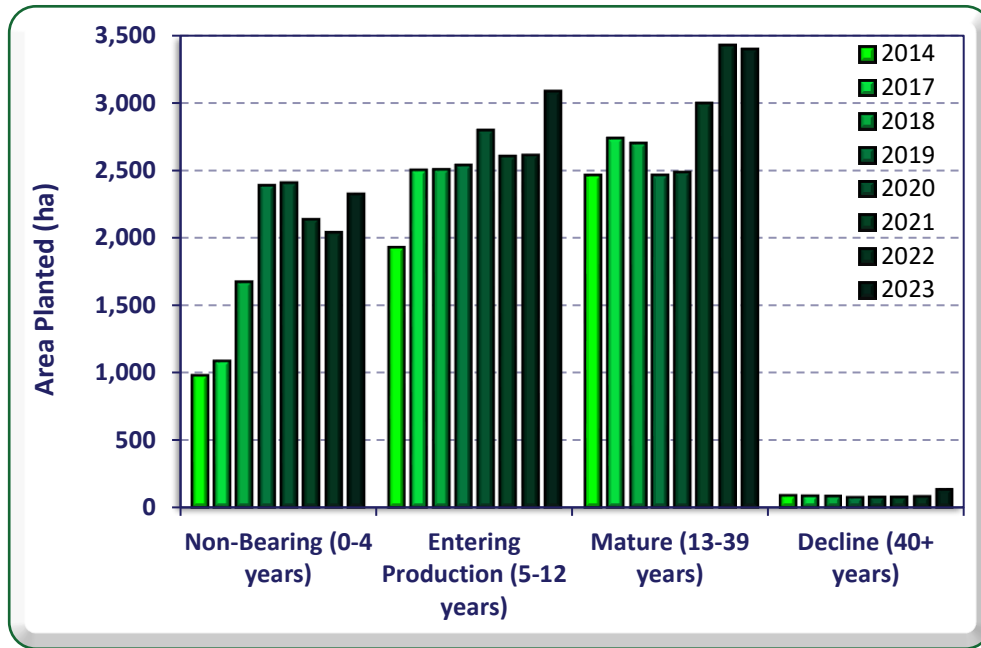


Source: Citrus Australia / Horticulture Innovation Australia

Notes: # Includes low seeded

The growth in mandarin plantings that occurred over the 2014 to 2023 period is evident from the area of non-bearing (0 – 4 years) trees increasing by 1,348 ha to 2,326 ha, a change of 138 percent (see Figure 16). However, the rate of new plantings has declined over the last two years. The change in the number of trees entering production (5 – 12 years) remained relatively static until 2023, when it jumped by 522 ha (20 percent) from the prior year. These trees in the entering production phase account for over a third of the total tree area. From 2014 to 2023, there has been a 940 ha (38 percent) increase in the area of mature trees (13 – 39 years), with the biggest increases occurring in 2021 and 2022. With a mandarin tree age profile in 2023 of one-quarter non-bearing and a very little area of trees in the declining age category (40+ years), the industry can expect rapid growth in production in the coming years as these trees begin to bear fruit.

Figure 16 – Change in Mandarin Maturity Profile 2014 to 2021



Source: Citrus Australia / Horticulture Innovation Australia

Production

MY 2024/25

FAS/Canberra forecasts record tangerine/mandarin production of 225,000 MT in MY 2024/25, a seven percent increase from the MY 2023/24 estimate of 210,000 MT. This increase is mainly due to the growing area of mandarin production.

As outlined earlier, the mandarin planted area in Australia has grown rapidly over the last decade. Important points to note are that there was a big step up in new plantings, which remained non-bearing for four years, starting from 2017, and has maintained a high level from 2019. This is now starting to have a significant impact as there was a big jump in the area of mandarins entering production in 2023, but also, the area of mature trees jumped in 2021 and 2022. There is almost as much area of trees entering production in the 5–12-year range as there are mature trees in the 13–39-year range (see Figure 16).

Even without further expansion of planted areas, the growing number of younger trees maturing into full production capacity is expected to drive annual mandarin production upward for several years. This trend underpins the record-breaking forecast for MY 2024/25, with expectations for more records in subsequent years. However, periodic adverse seasonal conditions may occasionally hinder year-on-year record-breaking performance.

As with orange production, mandarin growers are poised to benefit from ample irrigation water availability and lower fertilizer and chemical costs during the forecast year.

MY 2023/24

The MY 2023/24 mandarin production estimate of 210,000 MT is 30,000 MT higher than the forecast made 12 months prior. This increase was initially unexpected, given the anticipation of a down year influenced by biennial bearing patterns. However, the approximately eight percent growth in the area of trees of bearing age has more than offset this biennial effect. Additionally, favorable growing conditions in major production regions have contributed to broadly excellent quality outcomes for the season.

Consumption

MY 2024/25

FAS/Canberra forecasts domestic mandarin consumption at 118,000 MT for MY 2024/25, a six percent increase over the MY 2023/24 estimate and slightly above the level recorded in MY 2022/23. This growth is primarily driven by Australia's rapidly expanding population, a trend previously highlighted in the context of fresh orange consumption.

Over the past five years, per capita mandarin consumption in Australia has averaged around four kilograms per person, with year-to-year fluctuations but no definitive trend. There is, however, a slight indication of growth, potentially linked to the increasing production and retail availability of seedless varieties. Even if per capita consumption remains static, overall mandarin consumption is expected to rise in line with the growing Australian population.

Domestic consumption of mandarins is influenced by supply availability, which depends on production volume and quality. In seasons with high-quality production, a larger proportion of mandarins is often allocated to higher-value export markets, reducing the volume available for domestic consumption.

Currently, Australia consumes approximately half of its total mandarin production. However, as production continues to grow in the coming years, domestic consumption is expected to account for a decreasing share, as the pace of consumption growth is unlikely to match the rate of production increases.

MY 2023/24

The FAS/Canberra consumption estimate for MY 2023/24 stands at 111,000 MT, significantly higher than the 94,000 MT forecast made 12 months prior. This upward revision reflects much stronger-than-anticipated production during the marketing year.

Trade

Exports

MY 2024/25

FAS/Canberra forecasts mandarin exports to reach a new record of 105,000 MT in MY 2024/25, surpassing the likely record estimate of 97,000 MT in MY 2023/24. The ongoing expansion of mandarin planting areas and the increasing maturity of trees reaching full production are expected to drive record-breaking production and export levels in the coming years.

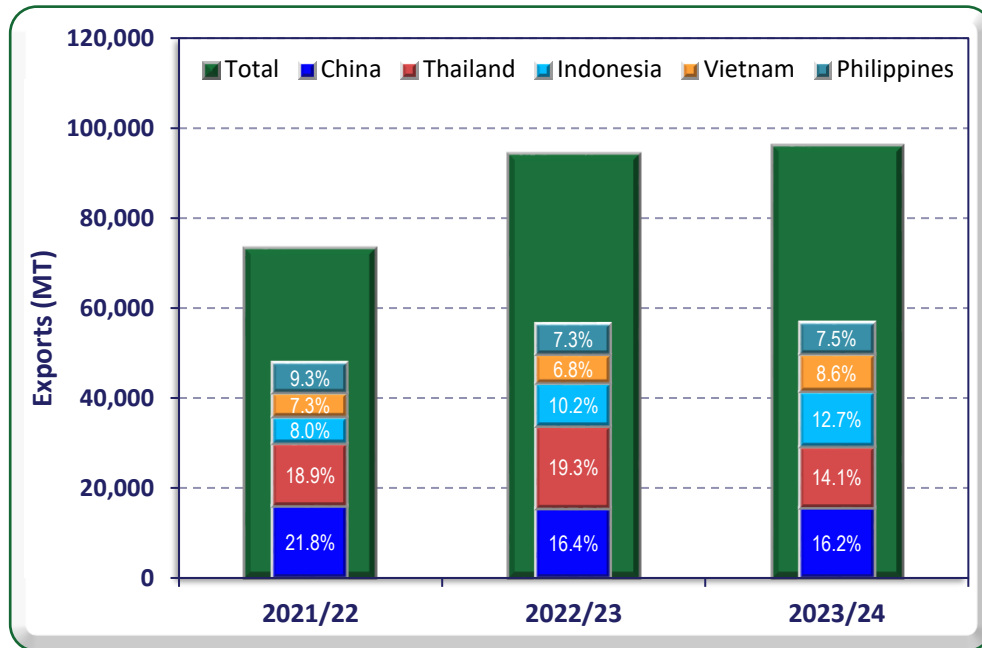
Australian mandarin exports are well diversified, reaching approximately 40 destinations. The top ten markets collectively account for about 85 percent of total exports over the past three years. The export destinations are evenly distributed, with no single country dominating.

MY 2023/24

The mandarin export estimate for MY 2023/24 has been revised upward to 97,000 MT, from the initial forecast of 85,000 MT set 12 months earlier. This adjustment reflects the significantly higher-than-expected production. Between April and October 2024, exports totaled 96,000 MT, accounting for nearly 99 percent of the average annual export volume during this period. This performance already surpassed the previous record of 95,000 MT set in the prior year.

China and Thailand have consistently been the leading destinations in recent years. In MY 2023/24, exports to Indonesia grew rapidly, positioning it close in significance to China and Thailand (see Figure 17). Vietnam and the Philippines have also been key markets, representing seven to ten percent of total exports in recent years. The remaining five countries within the top ten export destinations each account for around five percent of total exports, underscoring the diverse market base for Australian mandarins.

Figure 17 –Mandarin Export Destinations – Apr-Oct MY 2021/22 to MY2023/24



Source: Australian Bureau of Statistics

Imports

FAS/Canberra forecasts tangerine and mandarin imports for the 2024/25 marketing year (MY) at 2,000 MT, consistent with the MY 2023/24 estimate. While historical import levels were stable at around 4,000 MT per year, imports declined to 1,000 MT in MY 2022/23 but have shown signs of recovery in MY 2023/24. These imports are counter-seasonal to domestic production in Australia (similar to oranges) and primarily serve to meet low consumer demand during this period. Imports account for approximately one percent of domestic production and two percent of domestic consumption.

Table 3 - Production, Supply, and Distribution of Fresh Tangerines and Mandarins

Tangerines/Mandarins, Fresh Market Year Begins	2022/2023		2023/2024		2024/2025	
	Apr 2023		Apr 2024		Apr 2025	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Australia						
Area Planted (HECTARES)	7900	8200	8000	8900	0	9500
Area Harvested (HECTARES)	5800	6100	5900	6600	0	7000
Production (1000 MT)	190	215	180	210	0	225
Imports (1000 MT)	2	1	2	2	0	2
Total Supply (1000 MT)	192	216	182	212	0	227
Exports (1000 MT)	95	95	85	97	0	105
Fresh Dom. Consumption (1000 MT)	94	117	94	111	0	118
For Processing (1000 MT)	3	4	3	4	0	4
Total Distribution (1000 MT)	192	216	182	212	0	227

(HECTARES) ,(1000 TREES) ,(1000 MT)

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Attachments:

No Attachments