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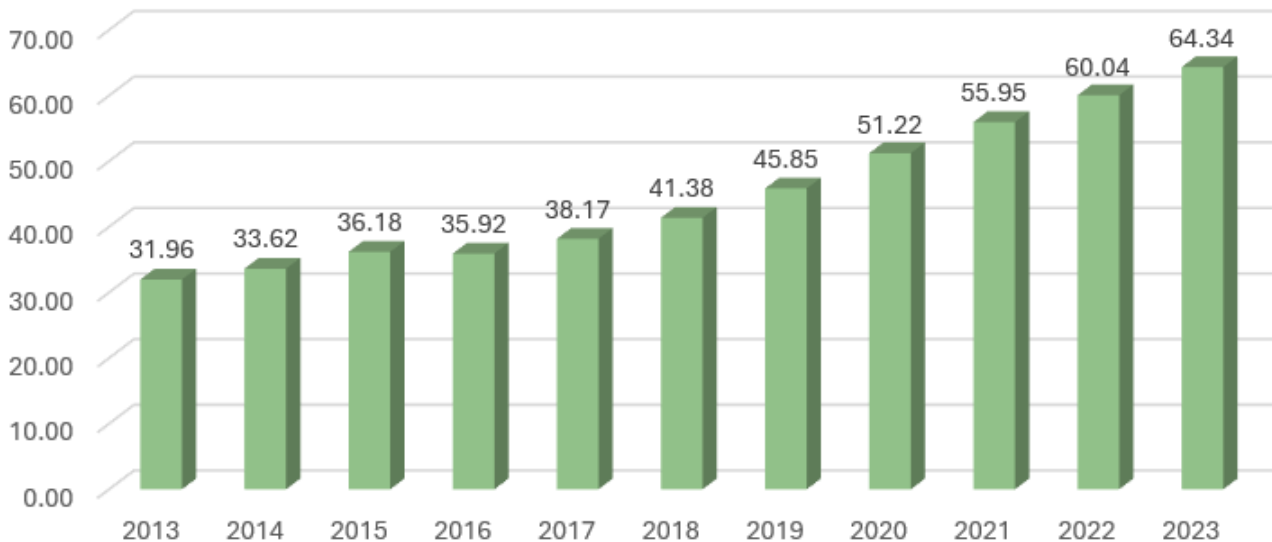
Approved By: Jon Flemings

Report Highlights:

Post forecasts China's overall citrus production in MY2024/25 will grow from MY2023/24, despite weather related challenges. Orange production is decreasing slightly due to the naturally smaller Navel crop year, while the production of tangerine/mandarins as well as pomelos/grapefruit will continue to grow. With China's large supply and increasing demand from southeast countries, Post forecasts citrus exports will continue to grow in MY2024/25.

CITRUS PRODUCTION OVERVIEW

Chart 1: China's Citrus Production (CY 2013-2023), Million Metric Tons



(Source: China Statistical Yearbook, 2024)

China remains the world's largest citrus producer, with dominant production of oranges, tangerines, mandarins, pomelos, and grapefruits. In 2023, China reported yet another 7 percent increase in citrus production, reaching a net total of more than 64 million metric tons. After grouping by regional leaders, the largest citrus growing provinces are Guangxi and Guangdong in south China, representing approximately 38 percent of the country's total. Hunan and Hubei provinces in central China produce 20 percent of the total citrus crop. Jiangxi and Fujian provinces account for 16 percent of overall citrus production. In the west, Chongqing and Sichuan represent a similar 16 percent of production. Citrus production in Yunnan and Guizhou are also on the rise. The remaining provinces represent only four percent of China's citrus crop.

Each Chinese province is known throughout southeast Asia by their citrus specialties. Guangxi continues to be the largest production area for *wogan* and *shatangju* varieties of tangerines and mandarins. *Chunjian* and *buzhihuo* are citrus hybrids mostly grown in Sichuan and Chongqing. *Red beauty* oranges from Zhejiang are considered of superior quality, while Jiangxi is famous for its *Nanfengmiju* mandarins. With favorable weather and geographic advantages, Yunnan produces a large variety of citrus produce, including *nanfengmiju*, *aiyuan*, *buzhihuo*, *mingrijian*, and *chunjian*. Guangdong is known for its high volume, continuing to produce massive crops of *shatangju*. The citrus crops in Fujian and Jiangxi feature late variety oranges and hybrid tangerines.

Regarding the MY 2024/25 crop, Post forecasts citrus production will grow slightly, despite challenges. Cold weather in early Spring may have impacted fruit setting. In addition, greening disease impacted multiple growing areas. The Guangxi *shatangju* crop could be down by 15-20 percent. The challenges to production will be offset by growth in the total number of producers in the industry, some of them new to orange farming.

Figure 1: Citrus Producing Provinces in China – 2023 (As a Percentage of Production)



(Source: China Statistical Yearbook, 2024; Legend: **Brown** = 38% (Guangxi & Guangdong); **Orange** = 20% (Hunan & Hubei); **Bright Yellow** = 16% (Jiangxi & Fujian); **Mustard Yellow** = 16% (Sichuan & Chongqing); **Green** = 6% (Yunnan & Guizhou))

ORANGES (HS CODE 080510)

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

Oranges, Fresh	2022/2023		2023/2024		2024/2025	
Market Year Begins	Nov 2022		Nov 2023		Nov 2024	
China	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	816530	816530	816530	816530	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)	7600	7600	7630	7630	0	7620
Imports (1000 MT)	213	213	190	160	0	150
Total Supply (1000 MT)	7813	7813	7820	7790	0	7770
Exports (1000 MT)	49	49	140	155	0	160
Fresh Dom. Consumption (1000 MT)	7544	7544	7455	7410	0	7338
For Processing (1000 MT)	220	220	225	225	0	230
Total Distribution (1000 MT)	7813	7813	7820	7790	0	7770

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

PRODUCTION

Post estimates China's orange production at 7.62 million metric tons (MMT) in marketing year (MY) 2024/25 (November-October), a slight reduction from the revised Post estimate for MY 2023/24. A range of weather-related issues are threatening orange production, including persistent rain in April and May that have caused lower fruit setting rates, as well as high temperatures in August and September. In addition, acreage reduction was rumored to be down because of weak market prices and competing crops. Specifically, Jiangxi and Guangxi province is expected to produce 20 percent less oranges because of maturing fruit trees and greening disease. The production depressing factors across key regions is expected to be offset by farmers in other provinces (i.e., Hunan, Hubei, Chongqing, Sichuan, Yunan, Guizhou) as their production grows.

PRICES

Traders expect average orchard prices to remain similar as last year, between RMB3.6 – RMB4.9 (\$0.5 – \$0.68) per kilogram. In mid-December 2024, the wholesale price of Navel oranges in Southern Jiangxi were between RMB6.12 – RMB6.35 (\$0.85 – \$0.88) per kilogram. Although the retail prices for premium domestic oranges remain stable, some locations are higher than last year. In mid-December, the retail price for high-end Navel oranges from southern Jiangxi are around RMB18.88 – RMB32 (\$2.6 – \$4.4) per kilogram. General navel orange retail prices could range from RMB7.5 – RMB20 (\$1.04 – \$2.7) per kilogram.

Price differences continue to exist between select varieties. The average orchard price for *bintangcheng renbin No 5* (hereafter *bintangcheng*) orange in mid-December is RMB5.88 – RMB6.10 (\$0.81 – \$0.84) per kilogram. The retail price of *bintangcheng* oranges varied significantly depending on different origins and brands. Using the premium “Chu” brand of the *bintangcheng* orange as an example, the retail price was quoted as high as RMB27.6 (\$3.8) per kilogram.

CONSUMPTION

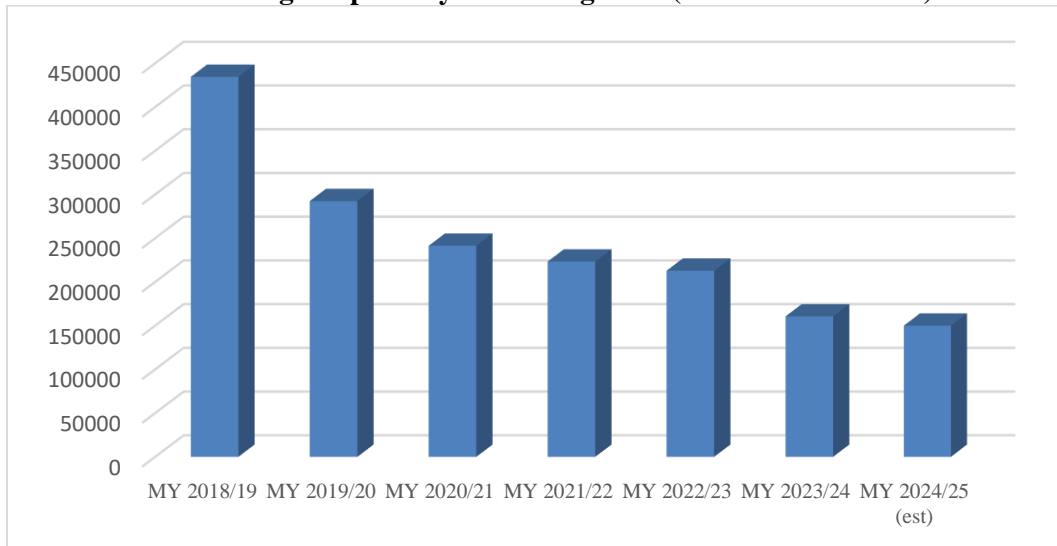
Fresh orange consumption in MY2024/25 is forecast at 7.34 MMT, a reduction from the revised Post estimate for MY 2023/24. Consumer consumption continues to be driven by a preference to save money versus spend money. Therefore, the speed of orange movement through the wholesale markets is noticeably slower than 5-years ago. Nevertheless, health-conscious Chinese consumers continue to incorporate fresh oranges into their daily diet.

TRADE

Imports

Post expects China's orange imports for MY2024/25 to be 150,000 MMT, down six percent from the previous year. Imported oranges are often sold at a premium, making them less desirable during times of weak consumption. In MY2023/24, China imported 22 percent fewer fresh oranges from the world, mainly due to its large domestic supplies and other shifts by the top 5 suppliers, respectively - South Africa (down 27 percent), Egypt (down 35 percent), Australia (up 36 percent), United States (down 7 percent) and Spain (up 2 percent).

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

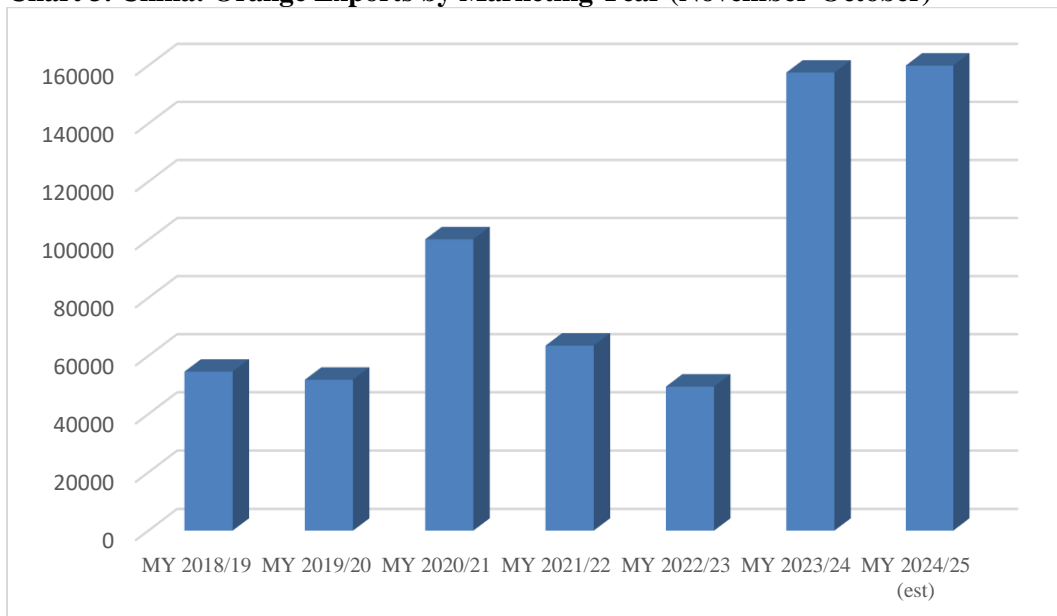


Unit: metric ton (MT); Source: Trade Data Monitor, LLC; ATO Guangzhou

Exports

Post expects China's orange exports to increase to 160,000 in MY 2024/25 because of strong demand from other Asian countries, as well as competitive prices. China has taken significant measures to boost regional trade, including preferential trade agreements, improved transportation (i.e., China-Laos Railway), and aggressive relationship building. Post acknowledges that the MY2023/24 orange exports were significant. The country's orange exports increased over 220 percent in MY2023/24, largely driven by limited competition coupled with strong demand from Southeast Asian countries, including Vietnam (up 92 percent) and Malaysia (up 1000 percent).

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



Unit: metric ton (MT); Source: Trade Data Monitor, LLC; ATO Guangzhou

ORANGE JUICE

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

Orange Juice Market Year Begins China	2022/2023		2023/2024		2024/2025	
	Oct 2022		Oct 2023		Oct 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Deliv. To Processors (MT)	220000	220000	230000	225000	0	230500
Beginning Stocks (MT)	0	0	0	0	0	0
Production (MT)	16920	16920	17500	17500	0	17800
Imports (MT)	119154	119154	119000	111248	0	111000
Total Supply (MT)	136074	136074	136500	128648	0	128800
Exports (MT)	3002	3002	3200	6400	0	6400
Domestic Consumption (MT)	133072	133072	133300	122348	0	122400
Ending Stocks (MT)	0	0	0	0	0	0
Total Distribution (MT)	136074	136074	136500	128748	0	128800

Unit: metric ton (MT)

PRODUCTION

Orange juice production in MY2024/25 is forecast at 17,800 MT, up slightly from the previous year. This increase reflects the increasing volume of oranges to be delivered for processing, as well as several new investors' entering the industry. Nongfu for example, launched its Nongfu Spring 17.5 NFC orange juice in 2016. In addition to importing the juice ingredients, the company recently began growing suitable oranges for juice processing in the provinces of Jiangxi, Hunan and Hubei.

PRICES

The price of frozen concentrated orange juice (FCOJ) in China is not readily available. However, in past years, the price has been based on global market trends. Several pressures are expected to influence prices, including tight global supplies. The MY2024/25 price of imported FCOJ is forecast to continue to rise, which will reduce the profit margin for the juice processors. The retail prices of premium 100 percent orange juice and not from concentrate (NFC) juices are expected to remain stable.

CONSUMPTION

Post estimates China's consumption of FCOJ in MY2024/25 will be 122,400 metric tons, a slight increase from the revised MY2023/24 data. China's MY2023/24 FCOJ consumption was adjusted down 8 percent, largely because of short supplies from traditional suppliers (i.e., Brazil).

Younger generations continue to prefer healthy premium juices, especially fresh squeezed orange juice. To match with the growing demand for 100 percent orange juice and NFC products, National brands such as "Huiyuan", "Nongfu Spring", and "Weiquan" promote not from concentrate and 100 percent orange juice items via both online and offline channels. Consumers in the first and second tier cities believe that these premium juices are healthier, richer in natural nutrients (i.e., Vitamin C) and convenient to consume.

The changing status of drinks made with juice concentrate is noteworthy. Generally, the market share for such drinks has been declining. However, demand remains strong in third and fourth tier cities, as drinks with lower

orange juice content (i.e., 50-60 percent orange juice) still represent a significant share of the market because of the lower price.

TRADE

Imports

Frozen orange juice imports in MY2024/25 are forecast slightly down at 111,000 MT, as limited availability of supplies from Brazil are expected to continue to put pressure on prices. China's juice processors traditionally rely on Brazilian supplies, which are expected to be down again in MY2024/25. Brazil's orange production may hit record lows, which will create an equivalent decrease to global orange juice inputs. China may need alternative suppliers (i.e., Israel, Costa Rica) or investment to increase its domestic processing capacity. The MY2023/24 estimate was adjusted down 7 percent to reflect China Customs data.

Exports

In MY2024/25, total orange juice exports are forecast at 6,400 MT, flat and in line with the significantly revised MY2023/24 exports. Other Asian countries are expected to continue to rely on China to help fill the gap created from Brazil's rising prices and limited supplies. The MY2023/24 estimate was adjusted up 100 percent to reflect China Customs data. Top export destinations in MY2023/24 were Australia, Japan, Hong Kong, Indonesia, Taiwan, North Korea, U.A.E., Germany, UK and Netherlands.

TANGERINES & MANDARINS (HS CODE 080520)

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

Tangerines/Mandarins, Fresh Market Year Begins China	2022/2023		2023/2024		2024/2025	
	Oct 2022		Oct 2023		Oct 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	890000	890000	890050	890050	0	890080
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)	26500	26500	26900	26900	0	27000
Imports (1000 MT)	67	67	65	43	0	50
Total Supply (1000 MT)	26567	26567	26965	26943	0	27050
Exports (1000 MT)	752	752	1050	1097	0	1200
Fresh Dom. Consumption (1000 MT)	25235	25235	25315	25246	0	25250
For Processing (1000 MT)	580	580	600	600	0	600
Total Distribution (1000 MT)	26567	26567	26965	26943	0	27050

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

PRODUCTION

In MY2024/25, China's production of tangerines and mandarins is forecast at 27.0 MMT, a slight increase from MY2023/24. Increasing production in multiple cities is expected to outpace the negative effects of citrus greening disease in Guangdong and Guangxi, excessive rain during the flowering phase, and heat-damaged fruit in Sichuan, Hubei and Hunan.

PRICES

In MY2024/25, Post expects the orchard prices to be stable for tangerines and mandarins, with some varieties listed at higher prices due to smaller crops. As for wholesale prices, different varieties are expected to demand significantly different prices. For example, on the same day in mid-December, the wholesale price of *Huangdigan* (a variety previously reserved for the Guangxi emperor) was listed as RMB4.6 (\$0.63) per kilogram, while the wholesale price for ordinary mandarins was listed as RMB1.2 (\$0.16) per kilogram.

CONSUMPTION

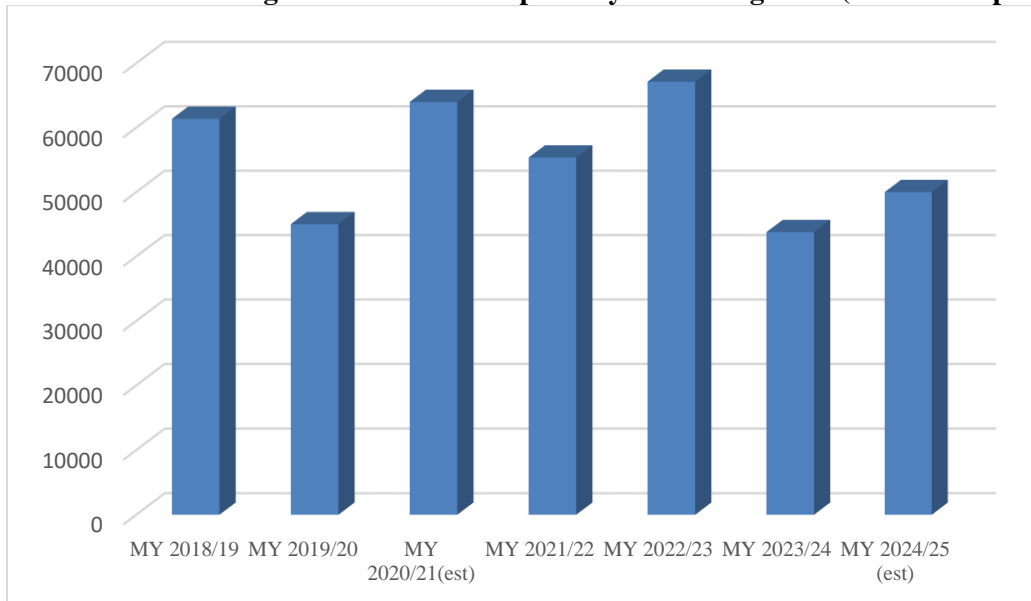
The domestic consumption for mandarin and tangerines in MY2024/25 is expected to reach 25MMT, slightly up from the revised Post estimate for MY 2023/24. Mandarins continue to be a highly sought after gift, especially for Lunar New Year (late January 2025).

TRADE

Imports

MY2024/25 imports of mandarins and tangerines are expected to rebound to 50,000 MT, as the crop size and quality from South Africa and Australia are expected to improve. In MY2023/24, China's total imports of tangerines and mandarins were 43,794 metric tons, down 34.7 percent from the previous year, mainly because of the decrease from the top three suppliers: South Africa (down 25.6 percent), Australia (down 16 percent) and Peru (down 77 percent). United States was the fifth largest supplier, providing China with 105,000 MT (up 56 percent), after Vietnam.

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

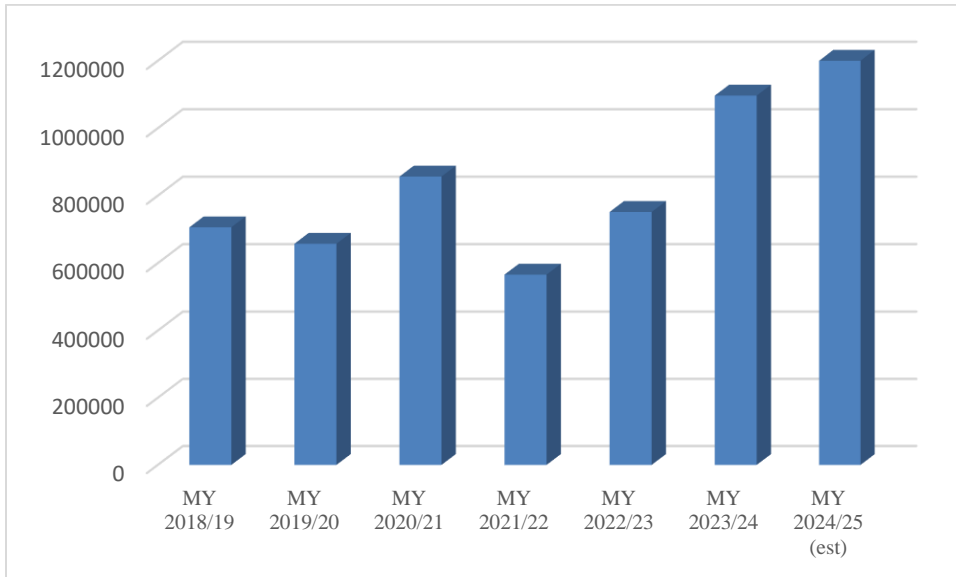


Unit: metric ton (MT); Source: Trade Data Monitor, LLC; ATO Guangzhou

Exports

China's exports of mandarins and tangerines in MY2023/24 was revised to 1.97 MMT to reflect the actual data. Top five international buyers are Vietnam, Kyrgyzstan, Russia, Indonesia, and Thailand. Vietnam represented over one third of China's total export volume imported 18 percent more.

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



Unit: metric ton (MT); Source: Trade Data Monitor, LLC; ATO Guangzhou

GRAPEFRUITS & POMELOS (HS CODE 080540)

Grapefruit, Fresh	2022/2023		2023/2024		2024/2025	
	Market Year Begins		Market Year Begins		Market Year Begins	
	China		China		China	
	USDA Official	New Post	USDA Official	New Post	USDA Official	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)	5150	5150	5200	5200	0	5250
Imports (1000 MT)	76	76	85	89	0	90
Total Supply (1000 MT)	5226	5226	5285	5289	0	5340
Exports (1000 MT)	152	152	195	204	0	230
Fresh Dom. Consumption (1000 MT)	5029	5029	5044	5039	0	5050
For Processing (1000 MT)	45	45	46	46	0	60
Total Distribution (1000 MT)	5226	5226	5285	5289	0	5340

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

PRODUCTION

Total pomelo and grapefruit production in MY2024/25 is forecast at 5.25MMT, a slight increase from the revised MY2023/24 production estimate (5.2MMT). In addition to Fujian and Guangdong, Guangxi and Jiangxi also grow large volumes of pomelos and hybrid grapefruit varieties. The increasing demand for high-quality pomelos

in the market is one of the drivers that encourages farmers to develop new varieties. Meizhou in Guangdong and Pinghe in Fujian is famous for their golden pomelo and red flesh pomelos. In addition, the demand for Organic pomelos is stable.

Grapefruit hybrids are mostly produced in the provinces of Hainan, Fujian, Guangdong, Guangxi, Hubei, as well as Jiangxi. During recent years, the provinces of Sichuan and Yunnan began producing pomelos.

PRICES

The average orchard price for pomelos and grapefruits in MY2024/25 is expected to vary significantly, anywhere between RMB1 – RMB10 (\$0.13 - \$1.38) per kilogram. In early December, the orchard prices for pomelos from Meizhou was RMB5 (\$0.69) per kilogram, while the price for pomelos from Sichuan was slightly higher at RMB6 (0.83) per kilogram. The ordinary pomelos were sold at RMB6 – RMB16 (\$0.83-\$2.22) per kilogram. Post has confirmed that retail prices for premium branded pomelos are approximately RMB28 (\$3.8) this year.

CONSUMPTION

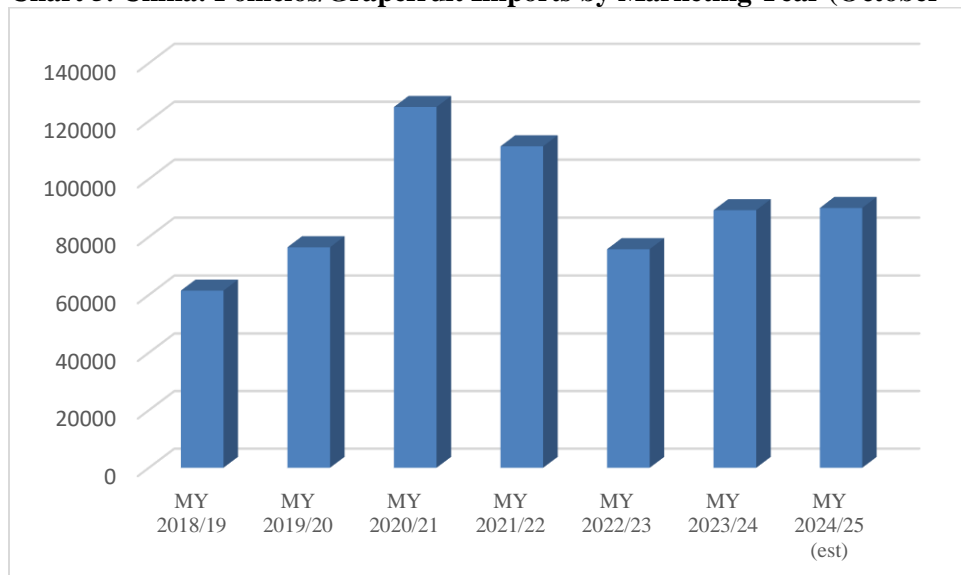
The consumption of grapefruit and pomelos in MY2024/25 is expected to reach 5.05MT, up slightly from the revised MY2023/24 estimate. Demand for premium pomelos and grapefruits will remain strong as health-conscious consumers choose this fruit for its organic acids, Vitamin C and other essential elements for weight and blood sugar management. In addition to fresh consumption, the demand for pomelo and grapefruit by beverage shops and fruit juice processors is expected to rise.

TRADE

Imports

Grapefruit imports for MY2024/25 are forecast to 90,000 MT, similar as the previous year’s estimates. In MY2023/24, China imported 89,220 metric tons of grapefruits and pomelos from the world, up 17.8 percent year-on-year. Major suppliers included South Africa, Laos, Thailand, Egypt, Israel and Taiwan.

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

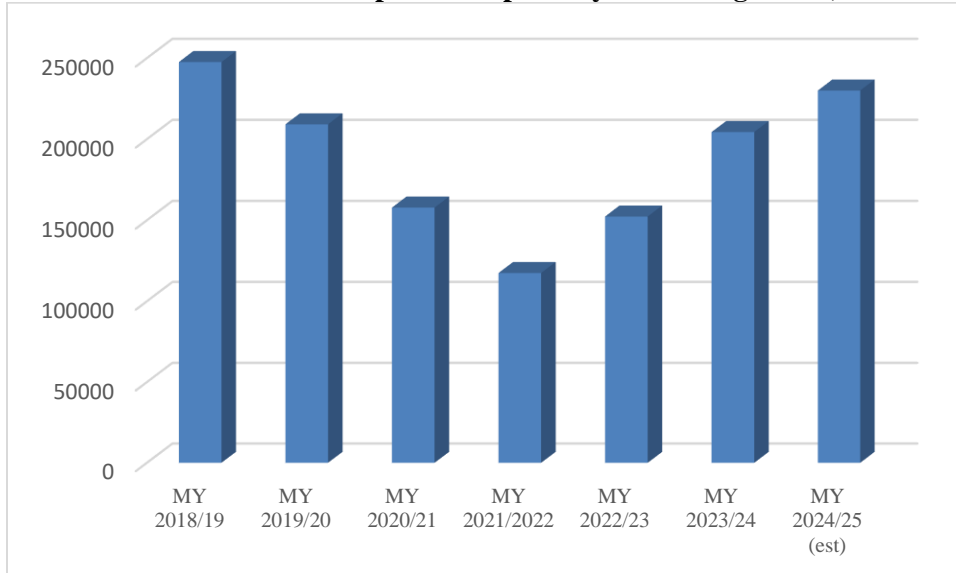


Unit: metric ton (MT); Source: Trade Data Monitor, LLC; ATO Guangzhou

Exports

Pomelo exports for MY2024/25 are forecast to 230,000 MT, up 12.7 percent from the previous year, to reflect the growing international demand for Chinese pomelos and grapefruit. Top export destinations include Netherlands, Russia, Kyrgyzstan, Ukraine, Romania and Canada. In MY2023/24, China's grapefruit and pomelo exports were up 34 percent from the previous year because of the strong demand from two major buyers: Netherlands (up 42 percent) and Russia (up 22 percent).

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



Unit: metric ton (MT); Source: Trade Data Monitor, LLC; ATO Guangzhou

CITRUS POLICY

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. By contrast, GACC suspended citrus imports from Taiwan (effective August 2022), citing insect infestations found in several shipments.

Citrus fruit from the United States has faced retaliatory tariffs since 2018. Since March 2020, a tariff exclusion process allows importers to apply for an exclusion to the PRC's 30-percent retaliatory Section 301 tariffs (see GAIN report [CH2020-0017](#)). However, the process does not exclude the PRC's retaliatory Section 232 tariffs. Therefore, U.S. citrus products are still subject to a 15-percent retaliatory Section 232 tariff in addition to MFN tariffs.

In 2020, Chinese citrus (e.g., pomelo, nanfeng honey mandarin, ponkan, sweet orange, and satsuma mandarin) gained market access to the United States.

Key GACC announcement is available here:

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

Citrus Marketing

Chinese consumers are discerning, especially given the large diversity of citrus products available in the market. Their purchasing decisions are often impacted by a range of factors, including freshness, appearance, taste, brix level, flavor, brand, origin, and price.

Intense online competition and offline retail promotions by major brands play an important role in citrus marketing. JD.com and Tmall are two major platforms for online purchases. In addition, livestream marketing via social media such as WeChat, Douyin, and Little Red Book are helping many exporters penetrate the massive Chinese market. Some vendors have found success through community purchases and specialized fruit chain stores. In addition, farmers are working to maximize their profit margins by selling their citrus directly to consumers with the use of various digital platforms.

Gift package design and branding (i.e., private labels) are becoming popular in retail stores to differentiate themselves from other competitors. In addition, new hybrid varieties such as seedless and easy-to-peel items will likely outperform the others. 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 were delivered to customers.

Consumers in Northern China prefer smaller-size oranges which were sold at relatively lower prices. Historically, fewer consumers in 3rd and 4th tier cities are willing to pay a premium for premium products. The speed of movement of branded items in mid-December is slower than a few years ago. Retail stores and online sales will continue to be the mainstream distribution channels.

Retail demand for tangerine and mandarins in China is highly diversified. High quality imported and domestic fruits will be in demand in high-end stores such as Sam's Club and Costco, as well as specialized fruit chain stores such as Pagoda and Greenery. Well-branded items will continue to enjoy good prices and sales in first and second tier cities. Ordinary fruits will continue to be sold through multiple supermarkets or via small vendors and "pop and mom" stores.

Attachments:

No Attachments