



JUICE MARKET REPORT

— June 2026

Monthly market insights for
global fruit solutions partners



Orange · Lemon · Pineapple
Mango · Apple · Grape



June Market Signals



June highlights a market shaped by climate pressure, selective crop recovery and changing demand patterns. Across citrus, tropical fruits, apple and grape, buyers continue to monitor availability, quality and price references, especially across European industrial applications.



Orange

The 2026/27 orange crop outlook remains lower than last season, while European buyers continue to monitor NFC and FCOJ references closely.



Lemon

Lemon juice remains firm, supported by limited nearby availability, steady demand and relevant pricing signals across Europe.



Pineapple

Pineapple supply remains origin driven, with tighter summer crop conditions and competitive alternatives shaping market references.



Mango

Mango market signals remain mixed, while Colombian NFC quality continues to stand out with strong Brix levels and limited free stocks.



Apple

Apple supply in Europe is drawing attention after frost damage in Poland, supporting firmer AJC references and renewed buying interest.



Grape

Grape juice remains stable overall, with Argentine shipments improving and European buyers still cautious ahead of the new season.



Orange Juice:

Lower Crop, Market Rebalancing

The orange juice market entered June with a tighter crop outlook and a more selective demand environment. Brazil's first official 2026/27 crop forecast confirms a lower production scenario, while market references continue to move within a broad range.

In Europe, NFC orange juice demand remains relatively stable, while large buyers continue to monitor FCOJ and NFC references ahead of upcoming contract negotiations. In the US, FCOJ movement is down 16.3% compared with last year, and NFC orange juice movement is down 6.2%.



Market References

Metric	Value
Brazil crop reference	Around 255 million boxes
Previous Brazil crop reference	Around 293 million boxes
FCOJ futures recent range	Around USD 1.50 to 1.90/lb
Expected FCOJ trading range	Around USD 1.40 to 2.10/lb
NFC orange juice reference FCA Europe	Around USD 780 to 820 per tonne, single strength
Mexico crop reference	Around 1.7 million tonnes



INCAL Perspective

Current orange market conditions highlight the importance of reliable sourcing, consistent quality and close market follow up. For European industrial applications, stable partnerships and dependable supply remain essential as buyers continue to monitor crop development and price references.

Lemon Juice:

Firm Market, Limited Availability

The lemon juice market entered June with firmer fundamentals and continued attention on European supply. Spain remains a key reference for NFC lemon juice, supported by quality, traceability and its role in the European beverage industry.

Availability remains selective across the market.

Argentine production has improved after earlier weather delays, while Spain is moving through a smaller season and Sicily continues to show limited concentrate availability.



Market References

Metric	Value
Spain NFC lemon juice reference	Around EUR 1,000 to 1,150 per tonne
Sicily NFC lemon juice reference	Around EUR 2,750 per tonne
Sicily concentrate supply	Currently exhausted
Argentina lemon crop reference	Around 1.40 to 1.50 million tonnes
Argentina lemon concentrate reference	Around USD 3,000 to 3,200 per tonne, 400 GPL
Nearby availability	Limited



INCAL Perspective

The current lemon market reinforces the importance of reliable European sourcing, technical consistency and supply planning. For industrial lemon applications, dependable availability and controlled quality remain essential as buyers continue to monitor crop development and market references.

Pineapple Juice: Selective Supply, Active Market References

Pineapple market references remain shaped by different origin conditions. Thailand, as a key pineapple origin, is facing tighter summer crop availability after drought and sunburn, supporting firmer raw material prices. At the same time, other origins continue to offer more competitive references for concentrate and NFC supplies.

Market References

Metric	Value
Thailand crop outlook	Around 30% below preseason expectations
Thailand raw material reference	Above THB 8.00 per kg
Thailand concentrate reference	Around USD 3,300 to 3,500 per tonne, 60 Brix FOB
Price tendency	Firm compared with previous month
Seasonal supply window	Summer crop expected to run until late July



Mango Juice: Mixed Origins, Quality Driven Demand

Mango market signals continue to vary by origin. Colombia reports lower factory intake after heavy rains, but NFC juice quality remains strong, with Brix levels of 16 to 20 and active demand from Europe and the US.

Market References

Metric	Value
India puree and concentrate references	Around USD 400 to 1,100 per tonne, depending on variety and product
Colombia concentrate reference	Around USD 1,265 per tonne, 28 Brix
Colombia NFC reference	Around USD 980 per tonne, single strength
Availability signal	Limited free stocks, with processed supply moving quickly
Demand signal	Active interest reported from Europe and the US



INCAL Perspective

Tropical fruit markets require careful reading of availability, quality profile and shipment timing. For beverage and fruit applications, consistent quality, flexible sourcing and dependable service remain essential for reliable supply planning.



Apple Juice: European Supply Focus, Firm AJC References

Apple juice concentrate remains closely linked to the European crop outlook. Poland continues to be a key reference for AJC, with frost damage supporting firmer pricing and stronger attention on high acidity material.

Market References

Metric	Value
Poland harvest estimate	Around 2.5 million tonnes
Previous Polish crop	3.8 to 4.0 million tonnes
Industrial apple prices	PLN 0.55 to 0.75 per kg
Polish AJC	EUR 1,500 to 1,700 per tonne, 70 Brix
Ukraine AJC	Around EUR 1,500 per tonne, 70 Brix



Grape Juice: Stable Supply, European Crop Watch

Grape juice markets remain relatively stable, with positive crop expectations across Spain, Italy and France. European buyers continue to monitor white and red grape concentrate references ahead of the new season.

Market References

Metric	Value
European crop outlook	Positive across Spain, Italy and France
European white grape concentrate	Around EUR 1,800 per tonne, 68 Brix
European red grape concentrate	Around EUR 1,950 per tonne, 68 Brix
Argentina white grape concentrate	Around USD 1,230 to 1,320 per tonne, 68 Brix
Argentina shipment signal	Higher exports compared with last year
Market focus	European crop development and new season availability



INCAL Perspective

Apple and grape markets continue to show different supply signals. In this environment, reliable sourcing, consistent quality and dependable service remain essential for customers across fruit applications.

