

OCTOBER

JUICE MARKET REPORT

Orange · Lemon · Grapefruit · Pineapple · Mango · Apple · Grape

Monthly market insights for global fruit solutions partners



October Market Signals

October highlights changing crop conditions, selective availability and measured demand across key juice categories. For European buyers, pricing and reliable supply planning remain in focus.



Orange

Softer demand and changing crop expectations are shaping FCOJ and NFC references as European buyers remain cautious.



Lemon

Spain's new processing season is approaching, with early concentrate offers and limited initial volumes keeping availability in focus.



Grapefruit

Small carryover inventories and selective availability keep attention on the next crop and pink and white concentrate pricing.



Pineapple

The winter crop is underway, while supply differences across origins and changing price references keep European sourcing in focus.



Mango

Tighter availability across several origins and limited free stocks keep supply continuity and forward planning important.



Apple

Poland's uncertain crop outlook and premiums for AJC with high acidity keep European buyers focused on pricing and availability.



Grape

With European processing campaigns nearing completion, new white grape concentrate offers are drawing attention to pricing and quality.



Orange Juice:

Softer Demand, Crop Signals in Focus

October points to a softer orange juice market, with weaker demand and higher inventories shaping buyer sentiment.

Brazil's second crop forecast rose to 263.15 million boxes, while export performance early in the season slowed and European demand remained subdued.

For European buyers, FCOJ and NFC references continue to be guided by selective purchasing, available stocks and cautious contract timing. Reliable sourcing and close market follow up remain important as the season develops.



Market References

Metric	Value
2026/27 Brazil crop reference	Around 263.15 million boxes
Previous Brazil crop reference	Around 293 million boxes
FCOJ futures recent range	Around USD 1.30 to 1.60/lb
FCOJ reference FCA Europe	Around USD 2,100 to 2,500 per tonne, 66 Brix
NFC orange juice reference FCA Europe	From around USD 750 per tonne, single strength



INCAL Perspective

Current market conditions reinforce the value of dependable sourcing, consistent quality and close market follow up. For European industrial applications, disciplined supply planning remains essential as buyers monitor pricing, crop signals and the pace of demand.

Lemon Juice:

Firm Prices Amid Tight Supplies

Argentina's 2026 lemon season has ended, leaving concentrate availability extremely limited and prices firm. International demand remains strong, although European buyers remain cautious at current price levels.

Attention is shifting to Spain's new crop, with favourable production prospects but limited initial processing. Early price indications range from EUR 3,600–3,900 per tonne for 400 GPL concentrate FOB Spain.



Market References

Metric	Value
European market conditions	Firm prices, limited availability
Spain 2026 crop outlook	Good production expected
Spain initial processing	Limited volumes expected
Spain concentrate price indication	EUR 3,600–3,900/t, 400 GPL, FOB
Argentina lemon concentrate reference	USD 3,000–3,400/t, 400 GPL cloudy
European buyer sentiment	Cautious at higher prices



INCAL Perspective

Spain's favourable crop outlook offers encouraging prospects for European supply. However, limited initial processing and firm prices highlight the importance of reliable sourcing, consistent quality and careful supply planning.

Pineapple & Mango Juice:

Selective Availability, Active Supply Planning

Pineapple Juice

Thailand has begun processing its Winter pineapple crop, with production now forecast at 800,000 tonnes, below earlier expectations of 1 million tonnes. Competition for raw material remains strong, supporting firm prices.

Processors report no carry-in stocks and continue working through outstanding Summer crop orders.

Despite the start of the new season, concentrate availability remains constrained.

Metric	Value
2026 production forecast	Around 800,000 tonnes
Initial production estimate	Around 1.0 million tonnes
Winter crop processing	Started
Previous month CFR Europe reference	USD 3,000–3,100/t, 60 Brix frozen
October CFR Europe indication	USD 2,900–3,300/t, 60 Brix frozen

Mango Juice

Colombia's main Summer mango season ended with slightly lower production, following unfavourable weather during key growing stages. Processing was directed primarily towards NFC, accounting for approximately 60% of output.

Most producers have exhausted available stocks, with remaining volumes largely committed to existing contracts. Demand remains strong, while limited availability continues to shape market conditions.

Metric	Value
October concentrate indication, CFR Europe	USD 1,600/t, 28 Brix
October mango puree indication, CFR Europe	USD 1,200/t, single strength
Totapuri concentrate output	Around 100,000 tonnes
Colombia production split	Around 60% NFC / 40% concentrate



INCAL Perspective

Pineapple and mango markets continue to reflect selective availability, with tighter pineapple conditions at the start of the Winter crop and limited mango volumes after the close of Colombia's main Summer season. For European industrial buyers, reliable sourcing, consistent quality and careful supply planning remain essential as market conditions continue to require close follow up.

Grapefruit Juice:

Softer Prices, Selective Availability

Grapefruit concentrate prices have eased compared with September, while available supplies remain limited as processors continue fulfilling existing contracts. Demand is relatively quiet, with buyers awaiting the next crop.

Florida's final 2025/26 grapefruit estimate stands at 1.35 million boxes, including 1.25 million red and 100,000 white. Growing conditions in Mexico have been favourable, with production expected to remain similar to last season as the new harvest approaches.



Market References

Metric	Value
Florida red grapefruit	Around 1.25 million boxes
Florida white grapefruit	Around 100,000 boxes
Texas 2025/26 crop	Around 2.1 million boxes
Pink/Red concentrate, October	USD 3,200–3,400/t, 58 Brix
White concentrate, October	USD 2,900–3,100/t, 58 Brix



INCAL Perspective

Easing grapefruit concentrate prices offer a more favourable market backdrop, although limited availability and ongoing supply commitments require careful planning. As the next harvest approaches, reliable sourcing, consistent quality and close attention to market developments remain essential.

Apple Juice & Grape Juice:

European Supply and Price Developments

Apple Juice

Poland's 2026 apple crop remains uncertain, with industry estimates above earlier forecasts. Processing activity is gradually increasing, while concentrate prices have eased compared with September.

Higher acidity concentrate remains limited as production continues shifting towards sweeter apple varieties. Although demand is currently subdued, buyers are closely monitoring the new season as processing volumes increase.

Metric	Value
EU 2026 production forecast	Around 9.5 million tonnes
Poland WAPA forecast	Around 2.7 million tonnes
Poland industry crop estimate	3.0–3.3 million tonnes
October Polish AJC	EUR 1,550–1,600/t, 70 Brix
Higher acidity AJC (3%+ acid)	EUR 2,000+/t

Grape Juice

Spain's 2026 grape harvest is nearing completion, with production expected to be similar to or slightly below last season. New offers for white grape concentrate indicate softer prices compared with September.

Italy is also approaching the end of its season, reporting slightly better production than Spain. European concentrate prices remain competitive as the current harvest concludes.

Metric	Value
Spain white concentrate	EUR 1,500–1,600/t, 65 Brix
Italy white concentrate	EUR 1,500/t, 65 Brix
Previous European price reference	EUR 1,600–1,700/t, 65 Brix
Spain 2026 crop outlook	Similar or slightly below 202



INCAL Perspective

European apple and grape concentrate markets are adjusting to new harvest conditions and evolving price levels. While apple supply remains selective for higher acidity products, softer grape concentrate offers highlight the importance of reliable sourcing, consistent quality and careful supply planning.