

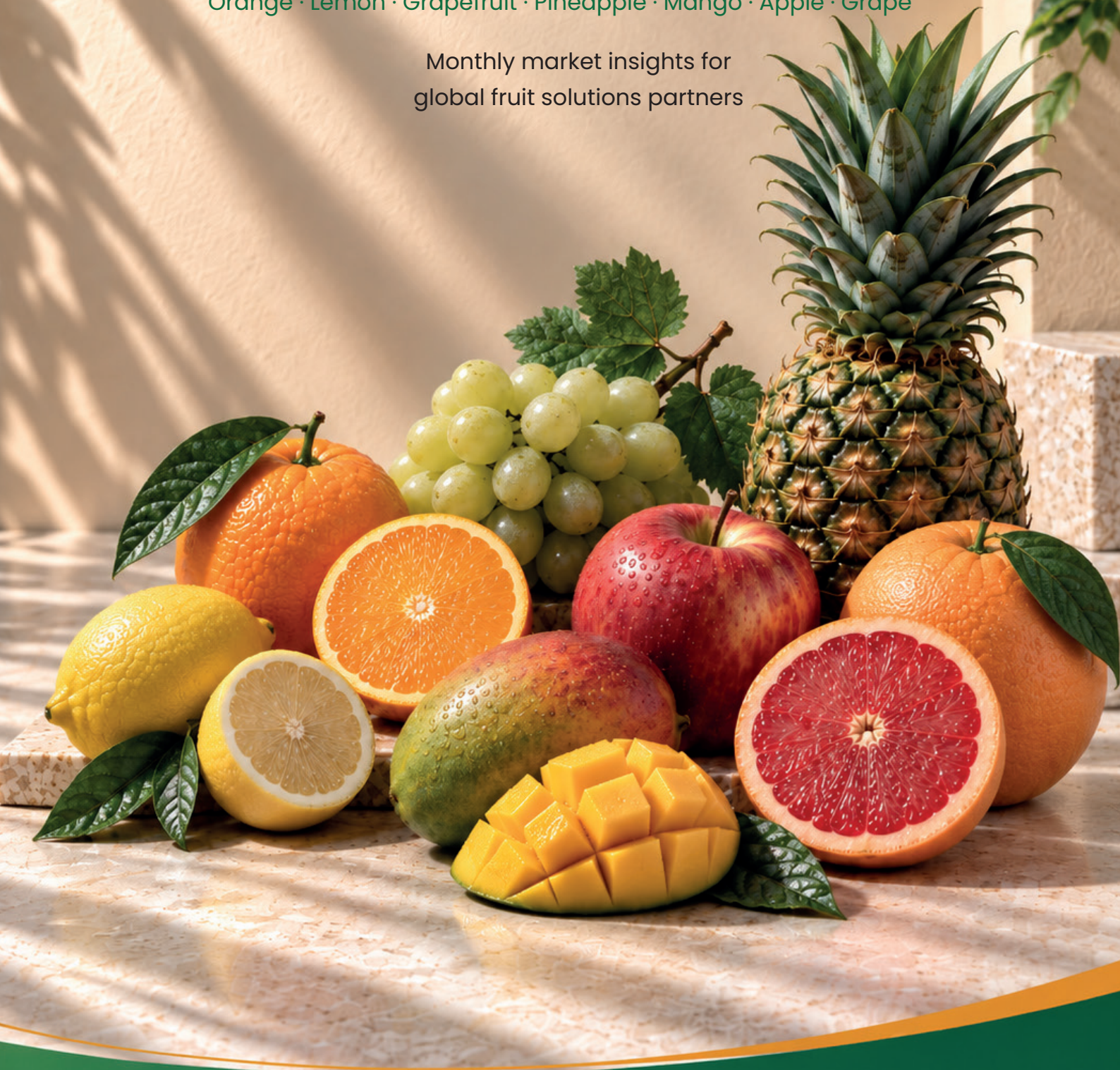


SEPTEMBER

JUICE MARKET REPORT

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

Monthly market insights for
global fruit solutions partners



September Market Signals

September reflects selective availability and changing crop conditions across key origins. For European buyers, reliable sourcing, quality and close market follow up remain central to supply planning.



Orange

Softer demand, higher inventories and crop updates continue to shape market expectations.



Lemon

Firm conditions and limited availability keep supply planning in focus, with Spain's new season outlook encouraging.



Grapefruit

Measured supply, small carryover inventories and focus on the upcoming crop.



Pineapple

Tighter supply and weather uncertainty keep alternative sourcing relevant for European buyers.



Mango

Mixed origin conditions and tighter availability keep buyers focused on crop development.



Apple

Firmer AJC references and improving crop conditions keep Europe's new season closely watched.



Grape

Stable supply and positive Italian crop signals keep attention on Europe's new season.



Orange Juice:

Softer Demand, Crop Updates in Focus

September brings a more measured orange juice market, with softer price references and continued attention on inventories and the new crop cycle. For European buyers, FCOJ offers have eased from previous levels, while NFC and concentrate references remain closely monitored ahead of upcoming contract decisions.

Supply fundamentals remain important, with the 2026/27 crop outlook still below last season. In this environment, quality, availability and dependable supply planning remain central for European industrial applications.



Market References

Metric	Value
2026/27 crop reference	Around 255 million boxes
Previous Brazil crop reference	Around 293 million boxes
FCOJ futures recent range	Around USD 1.19 to 1.50/lb
FCOJ reference FCA Europe	Around USD 2,100 to 3,100 per tonne, 66 Brix
NFC orange juice reference FCA Europe	Around USD 1,000 to 1,100 per tonne, single strength



INCAL Perspective

For European industrial applications, current market conditions reinforce the value of reliable sourcing, consistent quality and close market follow up. Dependable supply planning remains essential as buyers monitor reference levels and the new crop cycle.

Lemon Juice:

Firm Market, Limited Availability

The lemon juice market enters September with firm fundamentals and renewed attention on European sourcing. Buyers are awaiting Spain's new crop, where the outlook is encouraging after two difficult seasons. Most production is expected to remain focused on NFC, keeping concentrate availability selective.

Weather-related delays and lower juice yields elsewhere have reduced open volumes, with much of the current crop already allocated. For European industrial applications, dependable availability and forward supply planning remain important.



Market References

Metric	Value
Spain new season outlook	Recovery expected
Spain processing focus	Mainly NFC
2026 crop target	Around 1.50 million tonnes
Processing season	Extended through end of September
Argentina lemon concentrate reference	USD 3,000–3,400/t, 400 GPL cloudy
Open volume availability	Very limited



INCAL Perspective

Europe's improving crop outlook provides a more constructive backdrop, while selective concentrate availability keeps supply planning in focus. For industrial applications, reliable sourcing, consistent quality and close market follow up remain essential.

Pineapple Juice:

Tighter Supply, Limited Visibility

The pineapple market enters September with tighter supply after Thailand's summer crop closed below expectations. Updated projections point to around 800,000 tonnes in 2026, while European buyers continue to monitor availability and alternative sourcing as the smaller winter crop approaches.

Market References

Metric	Value
2026 production outlook	Around 800,000 tonnes
Earlier full year projection	Around 1.0 million tonnes
Winter crop expectation	Around 170,000 tonnes
Potential 2027 output	Around 650,000 tonnes
CFR Europe reference	Around USD 3,000–3,100/t, 60 Brix frozen



Mango Juice:

Mixed Origins, Selective Availability

Mango conditions remain mixed by origin. Totapuri production is estimated near 1.0 million tonnes, while tighter availability in South America keeps quality, continuity and logistics important for European buyers. Colombia continues to favour NFC production, limiting concentrate availability.

Market References

Metric	Value
Totapuri 2026 crop	Around 1.0 million tonnes
Totapuri puree output	Around 300,000 tonnes
Totapuri concentrate output	Around 100,000 tonnes
Colombia production split	Around 60% NFC / 40% concentrate
Concentrate reference CFR Europe	Around USD 1,550/t, 28 Brix



INCAL Perspective

Selective tropical fruit availability reinforces the importance of reliable sourcing and forward planning. For European industrial applications, consistent quality, continuity and dependable service remain central across both categories.



Grapefruit Juice:

Measured Supply, Crop Outlook in Focus

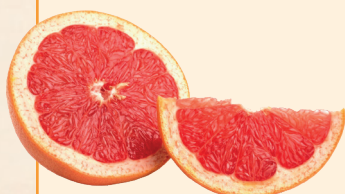
The grapefruit juice market enters September with measured supply and continued attention on the upcoming crop. Current conditions suggest improved available volume, although it remains too early for a firm forecast.

Small inventories remain available, while buyers continue to wait for clearer indications on the next season. Pink and white grapefruit references remain under close watch.



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 grapefruit reference	Around USD 3,400 to 3,700/t, 58 Brix
White grapefruit reference	Around USD 3,000 to 3,300/t, 58 Brix



INCAL Perspective

Current grapefruit market conditions highlight the value of reliable sourcing, consistent quality and close market follow up. As buyers wait for clearer indications on the next crop, dependable supply planning remains important.

Apple Juice:

European Supply Focus, Firm AJC References

Apple juice concentrate remains focused on Europe's new season. Improved conditions in Poland and continued demand for high acidity material are supporting firm AJC references, while buyers monitor availability and crop development.

Market References

Metric	Value
EU 2026 production forecast	Around 9.5 million tonnes
Poland WAPA forecast	Around 2.7 million tonnes
Poland industry estimate	Around 3.0–3.9 million tonnes
Polish AJC reference	EUR 1,600–1,750/t, 70 Brix
Polish NFC reference	EUR 340–400/t, single strength



Grape Juice:

Stable Supply, European Crop Watch

Grape juice supply remains broadly stable. In Europe, Italy shows a positive crop outlook, while Spain is expected to start slightly later as buyers continue to monitor availability and market references.

Market References

Metric	Value
Argentina exports Jan–Jul 2026	Around 55,390 tonnes
Supply status	Sufficient stocks until next crop
Argentina white GJC reference	USD 1,230–1,320/t, 68 Brix
Italy white GJC reference	EUR 1,600–1,700/t, 65 Brix
Spain market opening	Later than Italy, with similar opening offers



INCAL Perspective

Current apple and grape market conditions reinforce the value of reliable sourcing, consistent quality and close market follow up. For European industrial applications, dependable supply planning remains essential as the new season develops.

