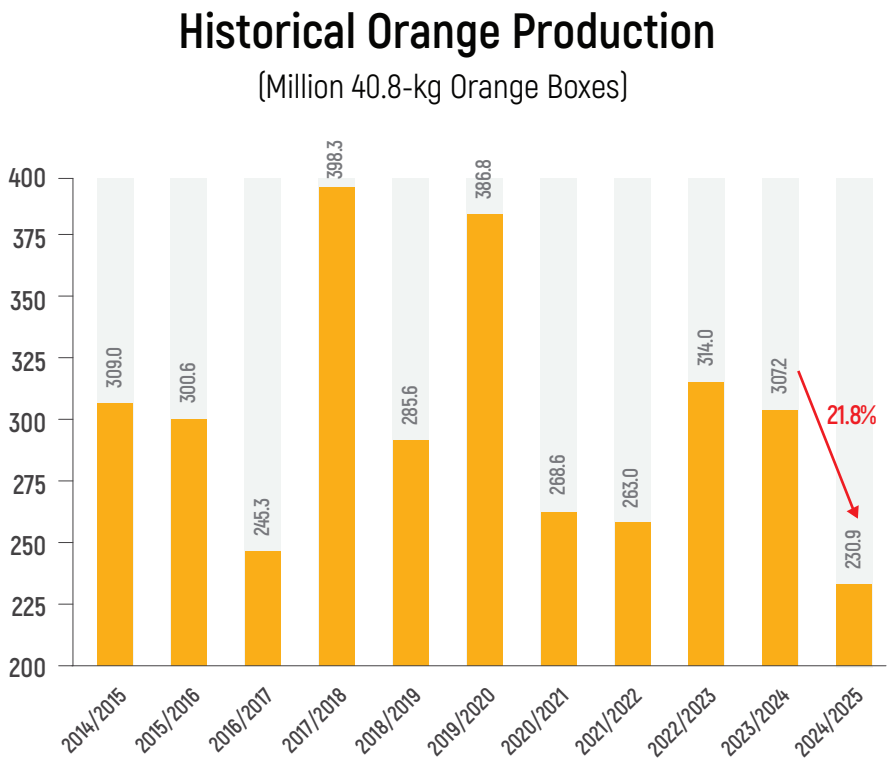
Orange production in the São Paulo and Minas Gerais citrus belt – 2024/25 crop

According to Fundecitrus data published in April 2025, the 2024/25 orange crop in the São Paulo and Minas Gerais citrus belt was finalized at 230.9 million 40.8-kg boxes. This result represents the smallest crop in more than 30 years, reflecting five consecutive low-yield seasons primarily due to prolonged drought and severe weather events. The volume was 21.8% lower than the 307.2 million boxes harvested in the 2023/24 season.

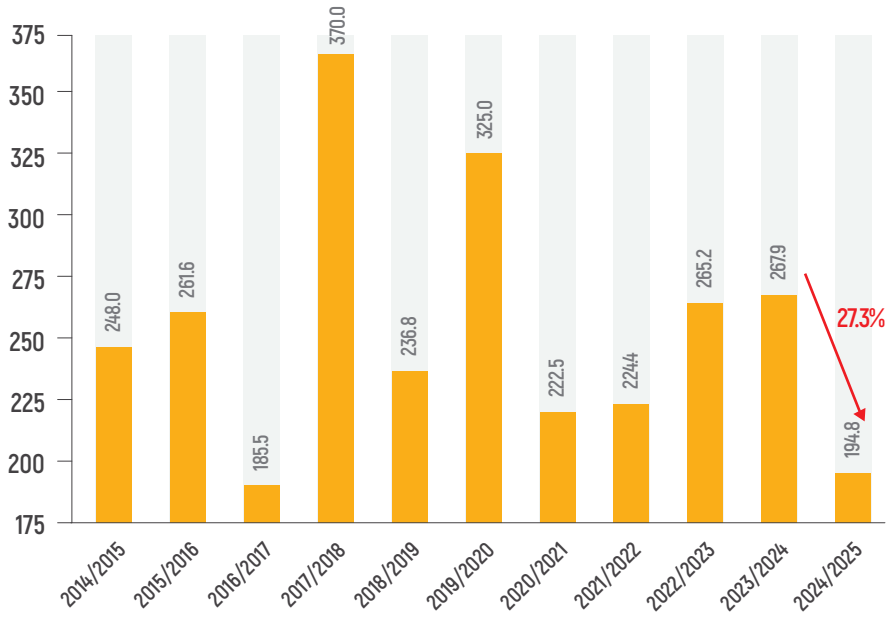


Orange processing

Based on figures from CitrusBR member companies and consolidated by an external auditor, the total volume of oranges processed in the citrus belt during the 2024/25 was estimated at 194.8 million 40.8-kg boxes, of which 171.0 million boxes were processed by CitrusBR members and 23.7 million boxes by non-members, considering fruit sourced from own groves as well as from third-party suppliers. This represents a 27.3% reduction compared with the 267.9 million boxes processed in 2023/24.

Historical Industrial Processing

(Million 40.8-kg Orange Boxes)

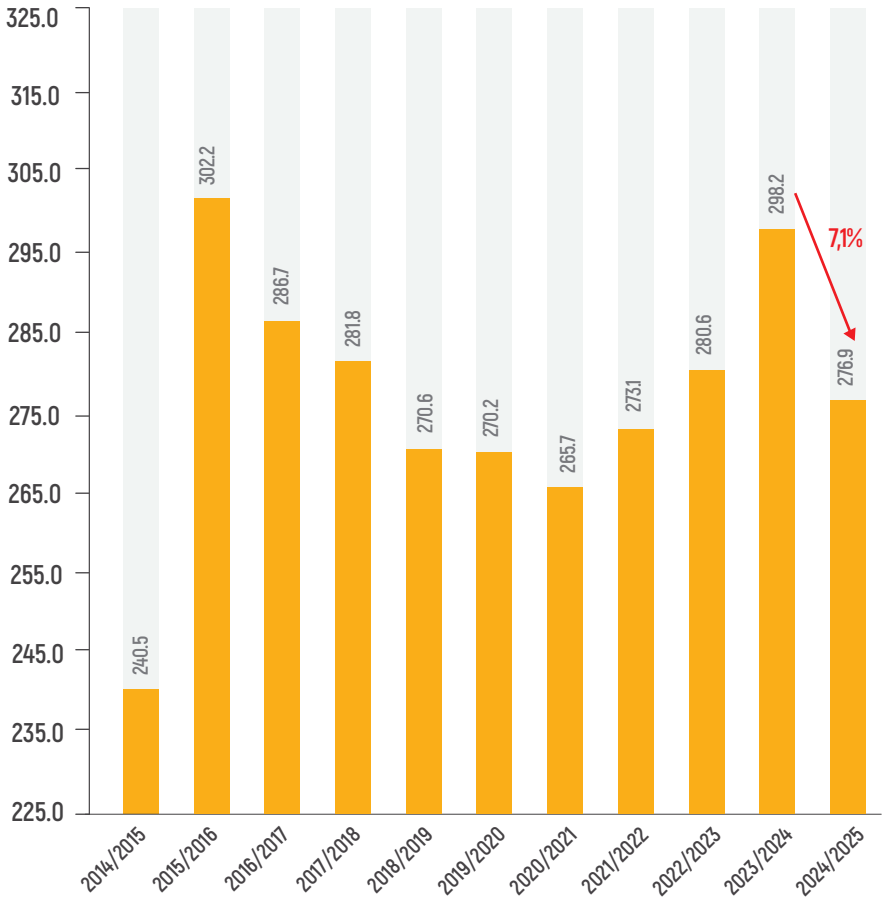


Industrial yield juice on fruit

Based on the same consolidated figures, the Industrial Yield Juice on Fruit in the 2024/25 season was estimated at 275.7 boxes of 40.8 kg per metric ton of FCOJ Equivalent at 66° Brix for CitrusBR members, and 286.7 boxes per metric ton for non-members, resulting in a weighted average of 276.9 boxes per metric ton of FCOJ Equivalent at 66° Brix. This represented a 7.1% improvement compared with the 298.2 boxes per metric ton recorded in 2023/24.

Evolution of Industrial Yield

(40.8-kg Boxes per Ton of FCOJ Equivalent at 66° Brix)

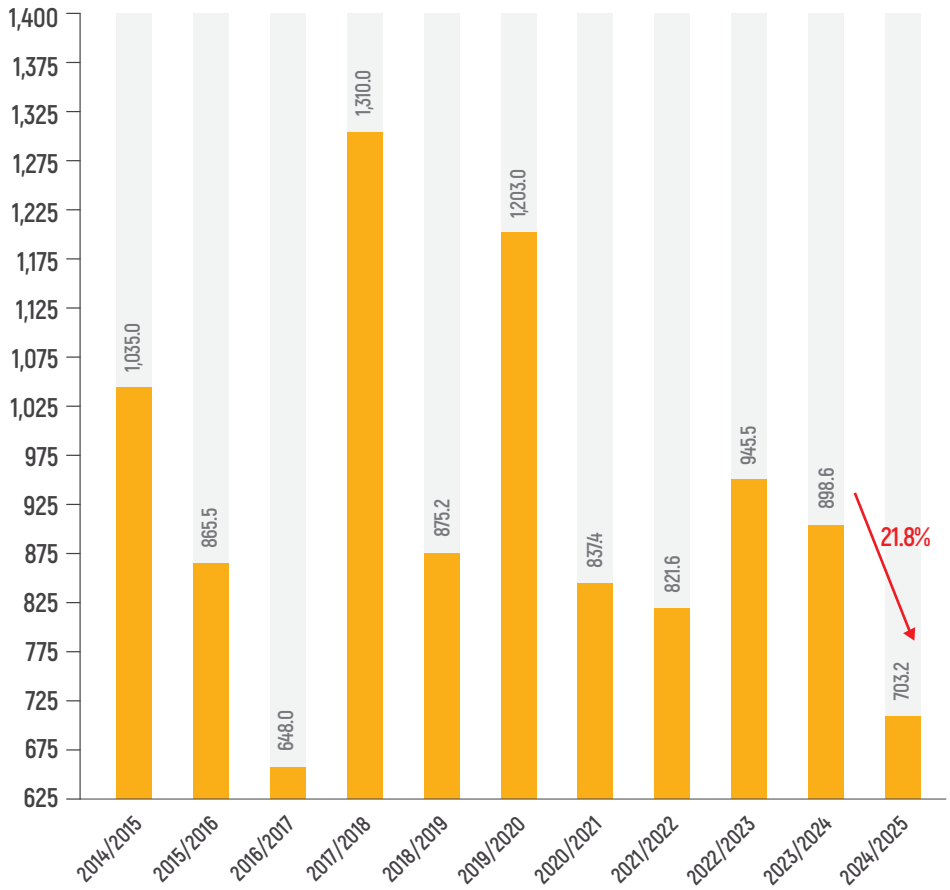


Orange juice production

The total orange juice production in the 2024/25 season was estimated at 703.2 thousand metric tons of FCOJ Equivalent at 66° Brix, a 21.8% decrease compared with the 898.7 thousand metric tons produced in 2023/24.

Historical Orange Juice Production

(Thousand Tons of FCOJ Equivalent at 66° Brix)

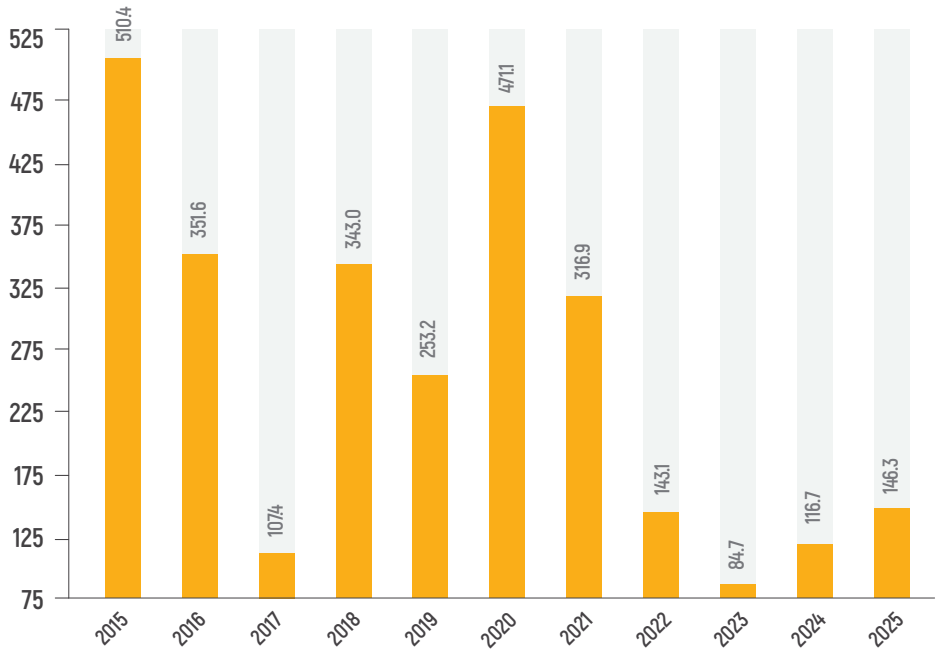


Audited juice inventories

A survey carried out through an independent audit of each CitrusBR member company and consolidated by an external audit revealed that the global inventories of Brazilian orange juice held by CitrusBR members, converted into FCOJ Equivalent at 66° Brix, amounted to 146.3 thousand metric tons as of June 30, 2025. This represents a 25.4% increase compared with the 116.7 thousand metric tons recorded on June 30, 2024. Despite the recovery, current inventory levels remain among the lowest in historical records, reinforcing the global supply constraint scenario.

Historical Orange Juice Inventories: June 30

(Thousand Tons of FCOJ Equivalent at 66° Brix)



Technical note on the development of the 2025/2026 season

The 2025/26 crop began in line with the blooming patterns identified by Fundecitrus and reported in the official crop estimate released on May 9. At that time, two predominant blooms were identified: the first accounting for 20.7% and the second for 69.9%, both being decisive factors for the characteristics of the fruit harvested so far.

Climatic conditions, also highlighted by Fundecitrus, showed that rainfall between January and March was below the historical average. Even with a reversal in April, the forecast of a colder winter with below-average precipitation was confirmed, resulting in a slower maturation process. As a consequence, fruits showed external ripening but with a slower reduction in acidity levels. This behavior was observed during the harvest of early varieties and the beginning of Pera orange harvest, keeping the ratio (Brix/acidity) relatively low.

It is worth noting that the second bloom identified by Fundecitrus occurred only in November 2024, after a prolonged period of water deficit that ended with the return of rains in October. Favored by continued rainfall in December, this bloom consolidated as the predominant one for the 2025/26 crop. Although the effects of citrus greening (HLB) require attention with regard to juice quality, this second bloom will guide the crop from September and October, creating positive conditions for fruit quality for juice production.

Under the current climatic scenario, a sharp improvement in ratio levels is not expected as early as September, due to the transition between blooms. However, the forecast of higher temperatures in September combined with the onset of rainfall in October tends to accelerate acidity reduction, leading to gradual improvement in ratio and overall juice quality – both sensory and physical-chemical. This improvement is expected to reach the market gradually in the last quarter of 2025. However, the impact of citrus greening (HLB) will remain an important point of concern.

Sao Paulo, September 1, 2025.

Ibiapaba Netto

Executive-Director