



Forecast update (variation in the May forecast):

September, 10 2025

Total orange crop production forecast: 306.74 million boxes (2.5% decrease)

Hamlin, Westin and Rubi: 47.14 million boxes (4.7% decrease)

Other early season: 18.00 million boxes (9.4% decrease)

Pera: 89.38 million boxes (1.3% decrease)

Valencia and Folha Murcha: 112.79 million boxes (1.6% decrease)

Natal: 39.43 million boxes (1.8% decrease)

Publication Schedule 2025-2026

2nd Crop forecast update: December 10, 2025

3rd Crop forecast update: February 10, 2026

Final crop forecast: April 10, 2026

Table 1 – Orange crop forecast update by sector and variety group – citrus belt

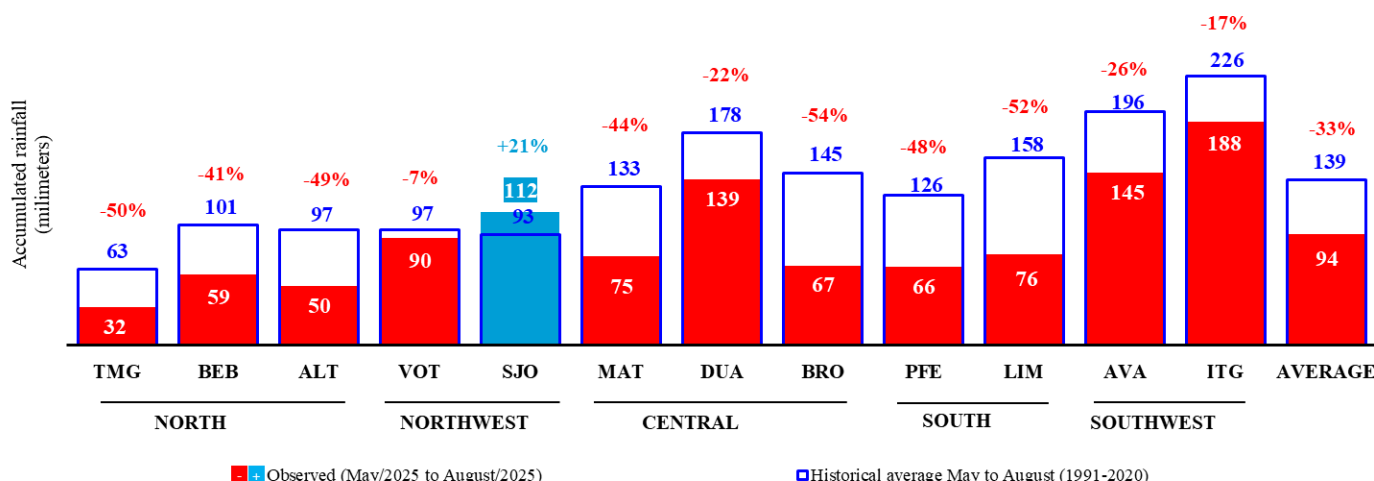
| Month | Forecast components | | | | Crop forecast 2025-2026 | | | Crop forecast update 2025-2026 | | |
|-----------------------------|--|-----------------------------|---------------------------|-----------------------------|-------------------------|-----------------|-------------------|--------------------------------|-----------------|-------------------|
| | May/2025 and September/2025 (strike-through values were presented in May, to their left are their respective values updated in September) | | | | May/2025 | | | September/2025 | | |
| Sector and variety group | Bearing trees | Fruit per tree at stripping | Fruit estimated per box | Estimated drop rate | Per tree | Per hectare | Total | Per tree | Per hectare | Total |
| | (1,000 trees) | (number) | (number) | (percentage) | (boxes/tree) | (boxes/hectare) | (1,000,000 boxes) | (boxes/tree) | (boxes/hectare) | (1,000,000 boxes) |
| CITRUS BELT | | | | | | | | | | |
| Hamlin, Westin and Rubi.... | 27,322.37 | 692 | 305 | 15.0 11.0 | 1.81 | 851 | 49.48 | 1.73 | 811 | 47.14 |
| Other early..... | 12,477.78 | 526 | 272 259 | 16.6 12.6 | 1.59 | 867 | 19.86 | 1.44 | 786 | 18.00 |
| Pera..... | 67,129.82 | 498 | 261 265 | 22.0 20.0 | 1.35 | 701 | 90.51 | 1.33 | 692 | 89.38 |
| Valencia and Folha Murcha | 56,767.51 | 695 | 235 | 24.9 23.9 | 2.02 | 1,002 | 114.58 | 1.99 | 987 | 112.79 |
| Natal..... | 19,013.25 | 753 | 242 | 25.5 24.3 | 2.11 | 1,065 | 40.17 | 2.07 | 1,045 | 39.43 |
| Total..... | 182,710.73 | 617 | 258 | 22.0 20.0 | 1.72 | 869 | 314.60 | 1.68 | 847 | 306.74 |
| NORTH SECTOR | | | | | | | | | | |
| Hamlin, Westin and Rubi.... | 6,695.54 | 642 | 301 303 | 12.2 10.3 | 1.71 | 744 | 11.42 | 1.67 | 727 | 11.17 |
| Other early..... | 3,098.88 | 394 | 265 250 | 10.0 8.9 | 1.28 | 700 | 3.98 | 1.19 | 651 | 3.70 |
| Pera..... | 15,002.13 | 466 | 251 254 | 21.6 16.7 | 1.37 | 732 | 20.50 | 1.29 | 692 | 19.37 |
| Valencia and Folha Murcha | 13,818.66 | 747 | 263 221 | 12.4 22.0 | 2.36 | 1,117 | 32.57 | 2.20 | 1,042 | 30.39 |
| Natal..... | 3,254.20 | 712 | 203 229 | 21.2 16.4 | 2.32 | 1,035 | 7.56 | 2.45 | 1,089 | 7.96 |
| Subtotal..... | 41,869.41 | 601 | 261 246 | 15.6 17.4 | 1.82 | 889 | 76.03 | 1.73 | 849 | 72.59 |
| NORTHWEST SECTOR | | | | | | | | | | |
| Hamlin, Westin and Rubi.... | 1,610.87 | 570 | 263 296 | 7.1 12.8 | 1.51 | 619 | 2.44 | 1.79 | 733 | 2.89 |
| Other early..... | 2,356.53 | 435 | 239 251 | 15.5 16.0 | 1.30 | 761 | 3.07 | 1.37 | 803 | 3.24 |
| Pera..... | 8,272.51 | 335 | 221 259 | 15.8 14.5 | 0.99 | 435 | 8.18 | 1.13 | 498 | 9.36 |
| Valencia and Folha Murcha | 2,666.32 | 536 | 193 234 | 17.8 24.0 | 1.56 | 707 | 4.15 | 2.02 | 917 | 5.38 |
| Natal..... | 1,439.05 | 418 | 216 252 | 9.7 24.0 | 1.13 | 619 | 1.62 | 1.55 | 852 | 2.23 |
| Subtotal..... | 16,345.28 | 413 | 223 257 | 14.5 17.4 | 1.19 | 552 | 19.46 | 1.41 | 655 | 23.10 |
| CENTRAL SECTOR | | | | | | | | | | |
| Hamlin, Westin and Rubi.... | 7,433.62 | 682 | 313 304 | 20.2 12.0 | 1.77 | 897 | 13.16 | 1.55 | 785 | 11.52 |
| Other early..... | 4,346.47 | 617 | 287 255 | 18.8 12.6 | 1.89 | 1,026 | 8.23 | 1.56 | 844 | 6.77 |
| Pera..... | 19,386.95 | 495 | 247 269 | 20.0 24.2 | 1.25 | 679 | 24.18 | 1.42 | 775 | 27.57 |
| Valencia and Folha Murcha | 16,393.87 | 605 | 198 243 | 21.7 25.6 | 1.66 | 855 | 27.15 | 2.11 | 1,092 | 34.67 |
| Natal..... | 5,114.10 | 691 | 241 245 | 32.8 23.3 | 1.93 | 991 | 9.89 | 1.71 | 874 | 8.72 |
| Subtotal..... | 52,675.01 | 585 | 245 262 | 21.9 21.5 | 1.57 | 826 | 82.61 | 1.69 | 892 | 89.25 |
| SOUTH SECTOR | | | | | | | | | | |
| Hamlin, Westin and Rubi.... | 5,039.47 | 638 | 316 310 | 17.8 12.9 | 1.61 | 787 | 8.10 | 1.48 | 724 | 7.45 |
| Other early..... | 494.31 | 421 | 292 277 | 17.6 18.0 | 1.11 | 552 | 0.55 | 1.05 | 522 | 0.52 |
| Pera..... | 12,493.76 | 506 | 273 274 | 29.8 21.9 | 1.29 | 686 | 16.11 | 1.15 | 614 | 14.42 |
| Valencia and Folha Murcha | 9,776.21 | 678 | 249 248 | 40.3 25.8 | 1.81 | 857 | 17.73 | 1.44 | 679 | 14.05 |
| Natal..... | 3,421.75 | 660 | 253 251 | 45.9 27.1 | 1.72 | 987 | 5.87 | 1.25 | 718 | 4.27 |
| Subtotal..... | 31,225.50 | 597 | 270 268 | 33.3 22.3 | 1.55 | 788 | 48.36 | 1.30 | 663 | 40.71 |
| SOUTHWEST SECTOR | | | | | | | | | | |
| Hamlin, Westin and Rubi.... | 6,542.87 | 825 | 300 306 | 12.0 9.2 | 2.19 | 1,035 | 14.36 | 2.16 | 1,016 | 14.11 |
| Other early..... | 2,181.59 | 654 | 275 277 | 18.7 12.5 | 1.85 | 971 | 4.03 | 1.73 | 908 | 3.77 |
| Pera..... | 11,974.47 | 647 | 292 263 | 20.7 18.2 | 1.80 | 929 | 21.54 | 1.56 | 805 | 18.66 |
| Valencia and Folha Murcha | 14,112.45 | 790 | 240 233 | 31.1 22.9 | 2.34 | 1,228 | 32.98 | 2.01 | 1,054 | 28.30 |
| Natal..... | 5,784.15 | 968 | 256 240 | 16.1 27.0 | 2.63 | 1,283 | 15.23 | 2.81 | 1,369 | 16.25 |
| Subtotal..... | 40,595.53 | 771 | 268 256 | 22.0 19.6 | 2.17 | 1,103 | 88.14 | 2.00 | 1,014 | 81.09 |



Total orange production¹ is updated at 306.74 million boxes

The first update of the 2025-2026 orange crop forecast for the São Paulo and West-Southwest Minas Gerais citrus belt, published on September 10, 2025, by Fundecitrus, carried out in cooperation with professor (retired) from FCAV/Unesp², is 306.74 million boxes of 40.8 kg (90-pound box). Compared with the May estimate, the crop season is expected to yield 7.86 million fewer boxes, a decline of 2.5%, due to a higher projected rate of premature fruit drop. Analyzing by maturity group, the early-season varieties decrease by approximately 6.1%, the mid-season (Pera) by 1.2%, and the late-season varieties by 1.6%. It is also estimated that approximately 25.84 million boxes will be harvested in the Triângulo Mineiro region.

According to Climatempo Meteorologia, from May to August 2025 the average accumulated rainfall in the citrus belt was 94 millimeters, which corresponds to a 33% deficit in relation to the historical average (1991-2020). Except for the São José do Rio Preto region, which recorded a rainfall level 21% above historical average, all other regions experienced volumes below their historical reference. The regions of Votuporanga, Itapetininga, and Avaré had rainfall levels fluctuating negatively to 7, 17, and 26% respectively, while the regions of Triângulo Mineiro, Bebedouro, Altinópolis, Matão, Brotas, Porto Ferreira, and Limeira experienced more pronounced reductions ranging from 41 to 54%, as shown in Graph 1.



Graph 1 – Accumulated rainfall from May to August (2025) in the Citrus Belt regions

Source: Fundecitrus, based on data from Climatempo Meteorologia

Although from May to August 2025 the accumulated rainfall was below the historical average in the citrus belt, the above-average rainfall recorded in late April and June was important to maintain soil moisture at satisfactory levels. Therefore, the projected weight of the early varieties Hamlin, Westin, and Rubi remains stable, while that of other early varieties decreased. The harvest of Pera variety oranges is occurring later this year than in previous years. This indicates that a significant portion of this variety's production will be harvested after the heavier rains expected in the spring, accounting for its higher projected weight. On the other hand, the projected gain in fruit weight of the Pera variety will be offset by the reduced weight observed in other early varieties and by the stable weight of the remaining varieties, keeping the initially estimated average size of oranges unchanged.

The number of oranges needed to fill a box remains at 305 fruits per box (134 grams/4.72 oz per fruit) for the Hamlin, Westin, and Rubi varieties. The initial projection of 259 fruits per box (158 grams/5.57 oz per fruit) for other early varieties was updated to 272 fruits per box (150 grams/5.29 oz per fruit). The Pera variety, whose initial projection was 265 fruits per box (154 grams/5.43 oz per fruit), was updated to 261 fruits per box (156 grams/5.50 oz per fruit). The number of oranges per box for the Valência and Folha Murcha varieties remains at 235 fruits per box (174 grams/6.13 oz per fruit). The Natal variety also remains stable at 242 fruits per box (169 grams/5.96 oz per fruit). The sizes by sector and variety are presented in Table 2.



Table 2 – Average fruit size, as pieces of fruit per box, by sector and variety³

| Group of varieties | Sector (hatched values were presented in May and their respective values updated in September are on the left) | | | | | |
|--------------------------------|---|---------------------------|---------------------------|---------------------------|---------------------------|---------------------------|
| | North | Northwest | Central | South | Southwest | Total |
| | (Fruits per box) | (Fruits per box) | (Fruits per box) | (Fruits per box) | (Fruits per box) | (Fruits per box) |
| Hamlin, Westin and Rubi..... | 301 303 | 263 296 | 313 304 | 316 310 | 300 306 | 305 |
| Other earlies..... | 265 250 | 239 251 | 287 255 | 292 277 | 275 277 | 272 259 |
| Pera..... | 251 254 | 221 259 | 247 269 | 273 274 | 292 263 | 261 265 |
| Valencia and Folha Murcha..... | 263 221 | 193 234 | 198 243 | 249 248 | 240 233 | 235 |
| Natal..... | 203 229 | 216 252 | 241 245 | 253 251 | 256 240 | 242 |
| Total..... | 261 246 | 223 257 | 245 262 | 270 268 | 268 256 | 258 |

³ The precision of the overall average of the citrus belt is higher than that of the sectors, or variety groups, due to the larger sample size.

By mid-August, only 25% of the crop had been harvested, a pace significantly slower than the previous cycle, which was already around 50% at this time, and slower than the 2023-2024 crop season, when the rate was about 40%. The harvest of early varieties, such as Hamlin, Westin, and Rubi, reached 68%, whereas 75% was registered for other early varieties. In the case of Pera variety, harvesting amounted to 17%. Among the late varieties, the harvest of Valência and Folha Murcha reached 1%, and the Natal variety, 2%. The later harvest observed in the current crop season is associated with the prevalence of fruits from the second bloom and with efforts to prioritize harvesting at the optimal stage of ripeness to produce a higher quality juice.

With later harvesting, an increase in the rate of premature fruit drop is observed, especially in trees affected by greening and subjected to water deficit and a harsher winter. The rise in greening intensity, driven by higher incidence and especially greater disease severity, shows that a larger share of orange tree crowns in the citrus belt is affected by symptoms, intensifying premature fruit drop. Furthermore, at this stage of the crop season, fruit drop from leprosy is occurring at a higher rate than in previous crops, driven by the drier and hotter weather in early 2025 as compared to prior cycles, which greatly favored disease spread.

Initially projected at 20.0% in the May estimate, the drop rate is now revised to 22.0%. When analyzed by variety, the drop rate of Hamlin, Westin, and Rubi oranges rises to 15.0%, representing an increase of 4 percentage points compared to the initial estimate. For other early varieties, the rate is adjusted to 16.6%, exceeding the previous estimate by 4 percentage points. The Pera variety had its rate elevated to 22.0%, an increase of 2 percentage points. The Valência and Folha Murcha varieties show an increase of 24.9%, with an upward variation of 1 percentage point. The Natal variety reaches 25.5%, 1.2 percentage point above the initial forecast. When analyzed by sector, the fruit drop rate is more intense where the incidence of greening is higher, such as in the South, Central, and Southwest regions. In the North and Northwest regions, with lower disease incidence, the drop rate is lower than initially projected. Drop rates by sector and variety are detailed in Table 3.



Table 3 – Average drop rates by sector and variety⁴

| Group of varieties | Sector (hatched values were presented in May and their respective values updated in September are on the left) | | | | | |
|--------------------------------|---|-----------------------------|-----------------------------|-----------------------------|-----------------------------|-----------------------------|
| | North | Northwest | Central | South | Southwest | Total |
| | (percentual) | (percentual) | (percentual) | (percentual) | (percentual) | (percentual) |
| Hamlin, Westin and Rubi..... | 12.2 10.3 | 7.1 12.8 | 20.2 12.0 | 17.8 12.9 | 12.0 9.2 | 15.0 11.0 |
| Other earlies..... | 10.0 8.9 | 15.5 16.0 | 18.8 12.6 | 17.6 18.0 | 18.7 12.5 | 16.6 12.6 |
| Pera..... | 21.6 16.7 | 15.8 14.5 | 20.0 24.2 | 29.8 21.9 | 20.7 18.2 | 22.0 20.0 |
| Valencia and Folha Murcha..... | 12.4 22.0 | 17.8 24.0 | 21.7 25.6 | 40.3 25.8 | 31.1 22.9 | 24.9 23.9 |
| Natal..... | 21.2 16.4 | 9.7 24.0 | 32.8 23.3 | 45.9 27.1 | 16.1 27.0 | 25.5 24.3 |
| Total..... | 15.6 17.4 | 14.5 17.4 | 21.9 21.5 | 33.3 22.3 | 22.0 19.6 | 22.0 20.0 |

⁴ The precision of the overall average of the citrus belt is higher than that of the sectors, or variety groups, due to the larger sample size.

This estimate was projected based on the available data and will continue to be updated as the harvest progresses. The next update is set to be released on December 10th.

The method used for the update is the same adopted in the previous crop season. Information was obtained from the monitoring survey started in May on 1,200 plots that are no longer visited when fruit harvest is complete. Other data used in this study is size of fruit received throughout the crop season by orange juice companies associated to Fundecitrus – Citrosuco, Cutrale and Louis Dreyfus – for industrial processing. Each processing company supplies individual data under confidentiality for the calculation of the average size of processed fruit.

¹ Hamlin, Westin, Rubi, Valencia Americana, Seleta, Pineapple, Alvorada, Pera, Valencia, Folha Murcha and Natal.

² Department of Exact Sciences, FCAV/Unesp Jaboticabal Campus.