



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	
2 nd Crop forecast update:	December 10, 2025
3 rd Crop forecast update:	February 10, 2026
Final crop forecast:	April 10, 2026

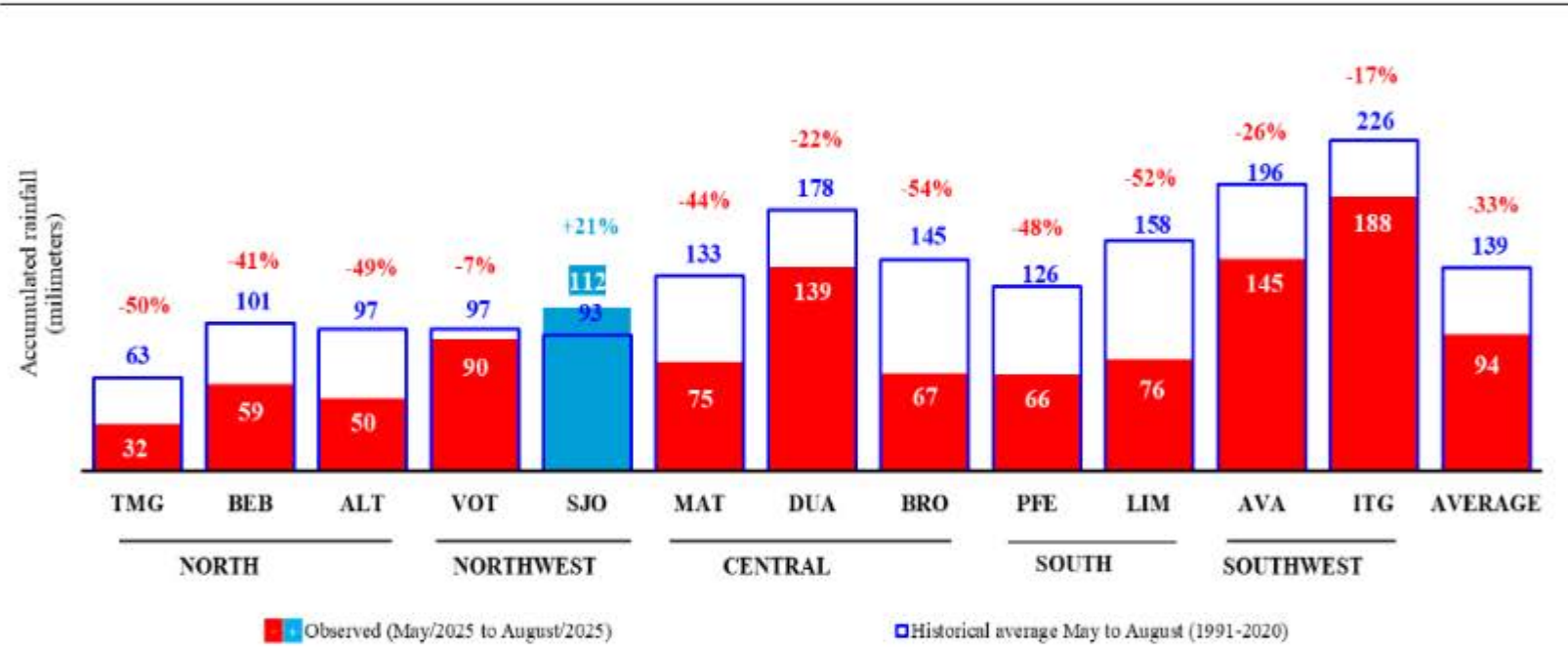
Table 1 – Orange crop forecast update by sector and variety group – citrus belt

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 (1,000 trees)	Fruit per tree at stripping (number)	Fruit estimated per box (number)	Estimated drop rate (percentage)	Per tree (boxes/tree)	Per hectare (boxes/hectare)	Total (1,000,000 boxes)	Per tree (boxes/tree)	Per hectare (boxes/hectare)	Total (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 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 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.
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